Compusearch Software Systems, Inc.

PRISM

* PRISM 5.0, Service Pack 12

New Functionality

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***** *This document was originally published in December, 2005 with the title, "PRISM 5.0 COTS Release Two New Functionality." Some of the content has been amended, and the document has been renamed to "PRISM 5.0 COTS Service Pack 12 New Functionality."*

Notices

Trademarks and Service Marks

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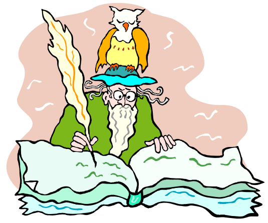
Overview

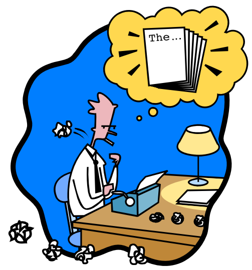
This document describes the changes made in PRISM 5.0 in Service Pack 12. Enhancements to PRISM user functionality are listed first, and in alphabetical order. Administrator functionality is last.



Your Notes

Contracting Officer Representative – Automatic Access to Awards

PRISM has been enhanced to now automatically give the Contracting Officer Representative access to the awards to which they are assigned. This applies to all awards except IAA's and MIPR's.



Your Notes

Dollar Amount Notification

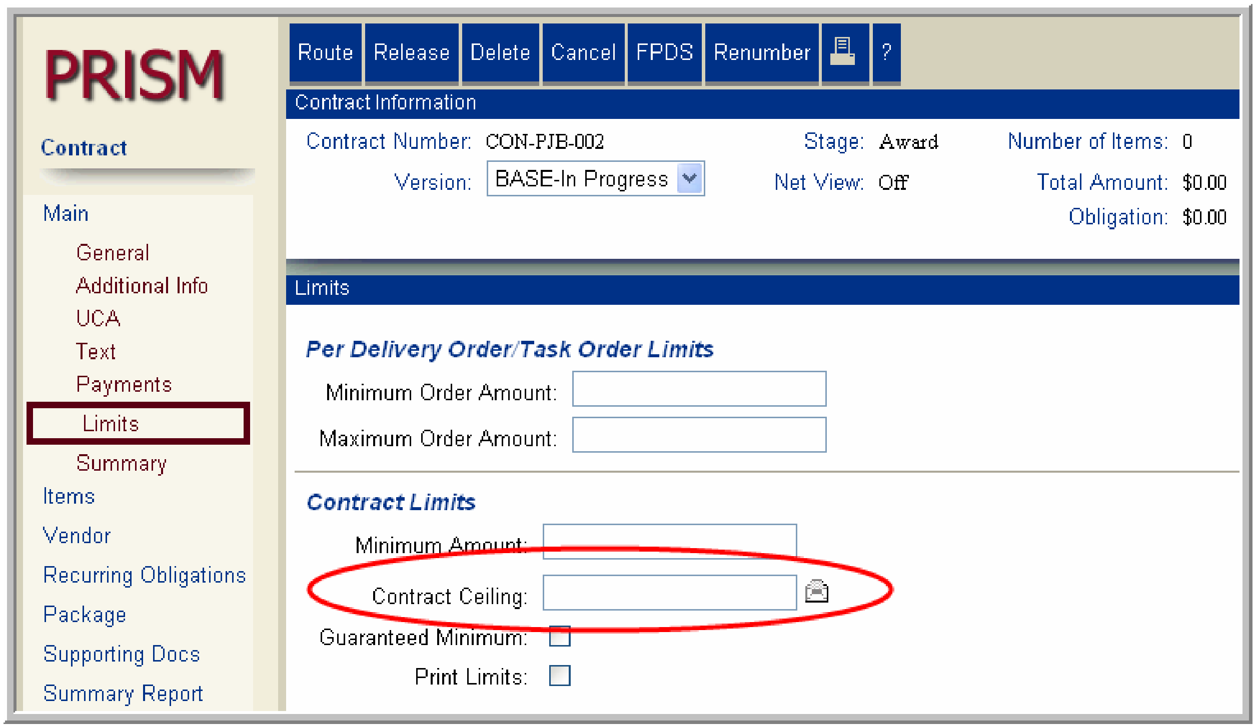
The notification envelope icon has been added to the *Contract Ceiling* field on the Limits page for contracts, the *Maximum Amount* field on the Items General page, and the *Total Amount of Calls Not to Exceed* field on the Limits page for BPA setups. Use it to access the Notification Detail page, on which you can add notifications for contract ceilings, maximum amounts on contracts, and call limits on BPA setups.

Limits Page for Contracts

This section illustrates how this notification envelope icon for the *Contract Ceiling* field might look on the Limits page for contracts, at your agency.

To access this page, follow these steps.

1. From the PRISM Welcome page, open or create a contract. The General Information page displays.
2. Click **Limits** on the left menu. The Limits page displays.



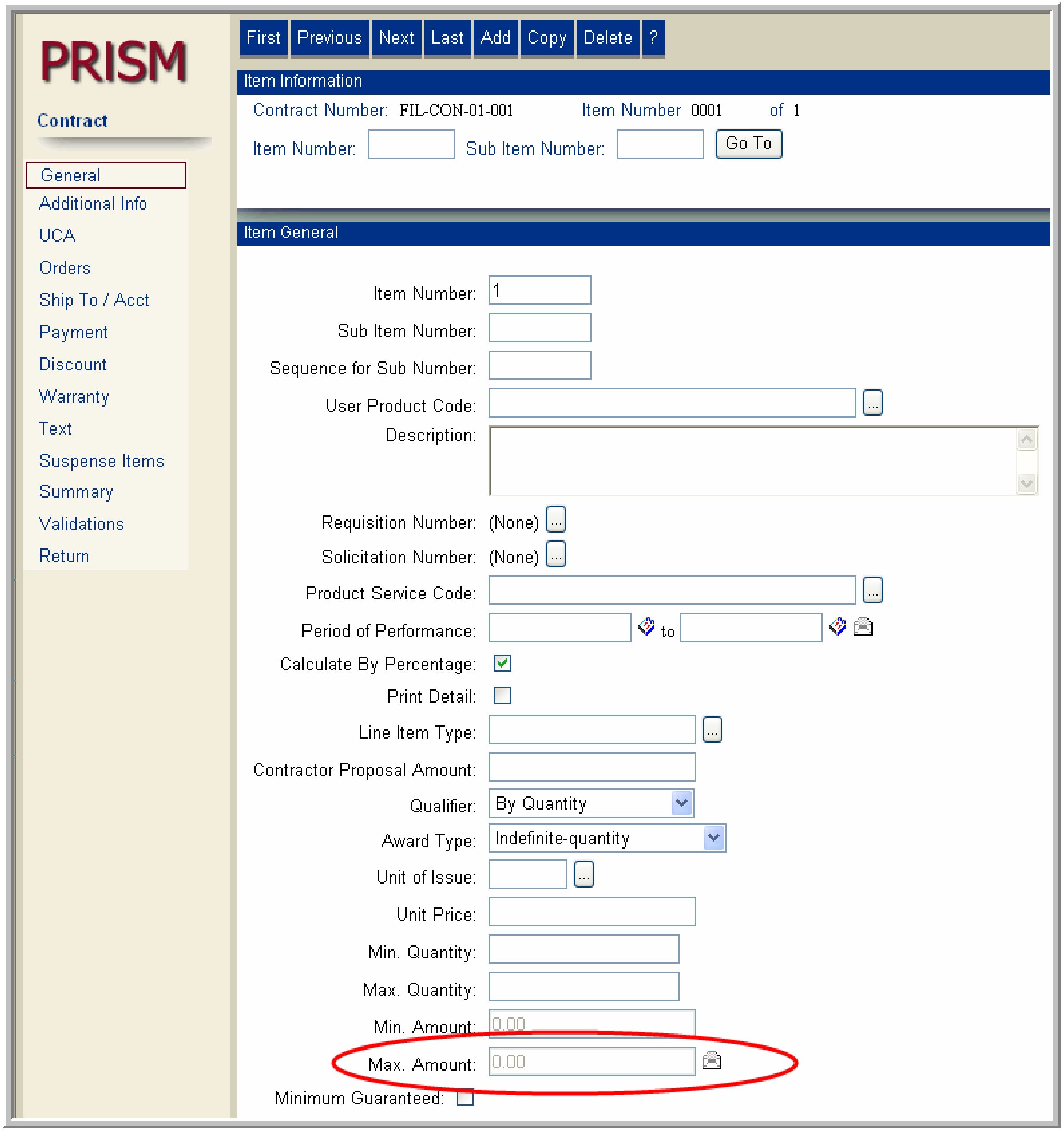
Items General Page

This section illustrates how this notification envelope icon for the *Maximum Amount* field might look on the Items General page for contracts, at your agency.

To access this page, follow these steps.

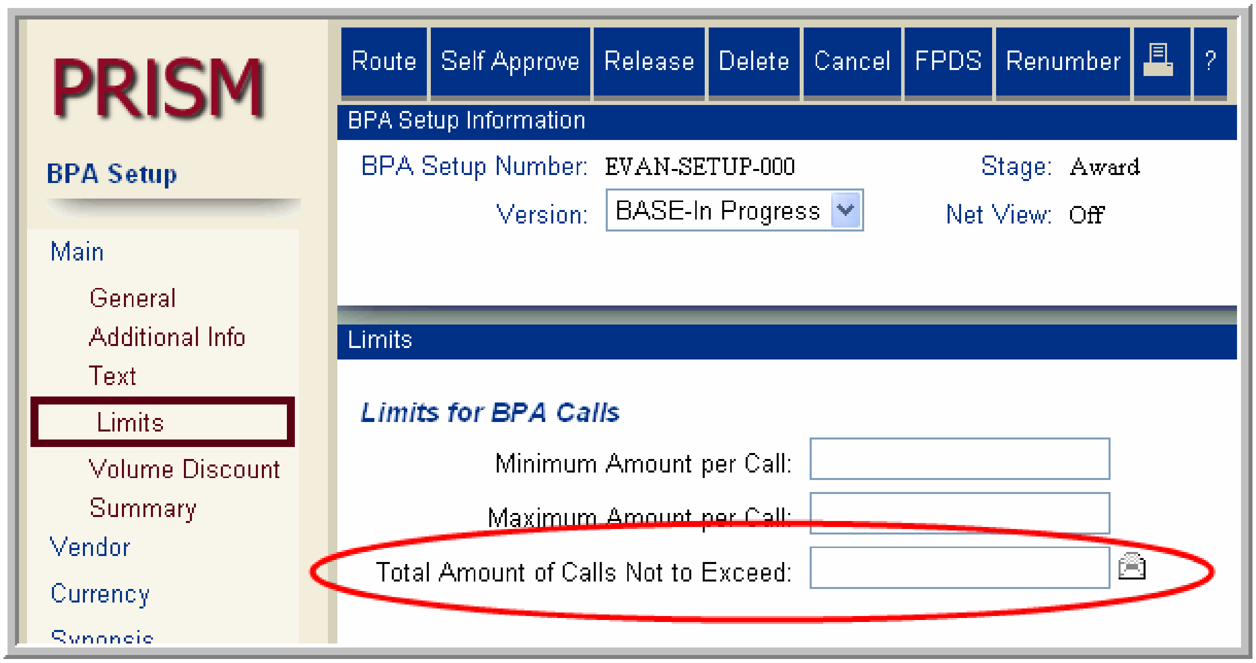
1. From the PRISM Welcome page, open or create a contract. The General Information page displays.

2. Click **Items** on the left menu. The Items page displays.
3. Click **Add**, or select an item from the list and click **Edit**. The Item General page displays.



Limits Page for BPA Setups

This section illustrates how this notification envelope icon for the *Total Amount of Calls Not to Exceed* field might look on the Items General page at your agency.



Notification Detail Page (for Limits)

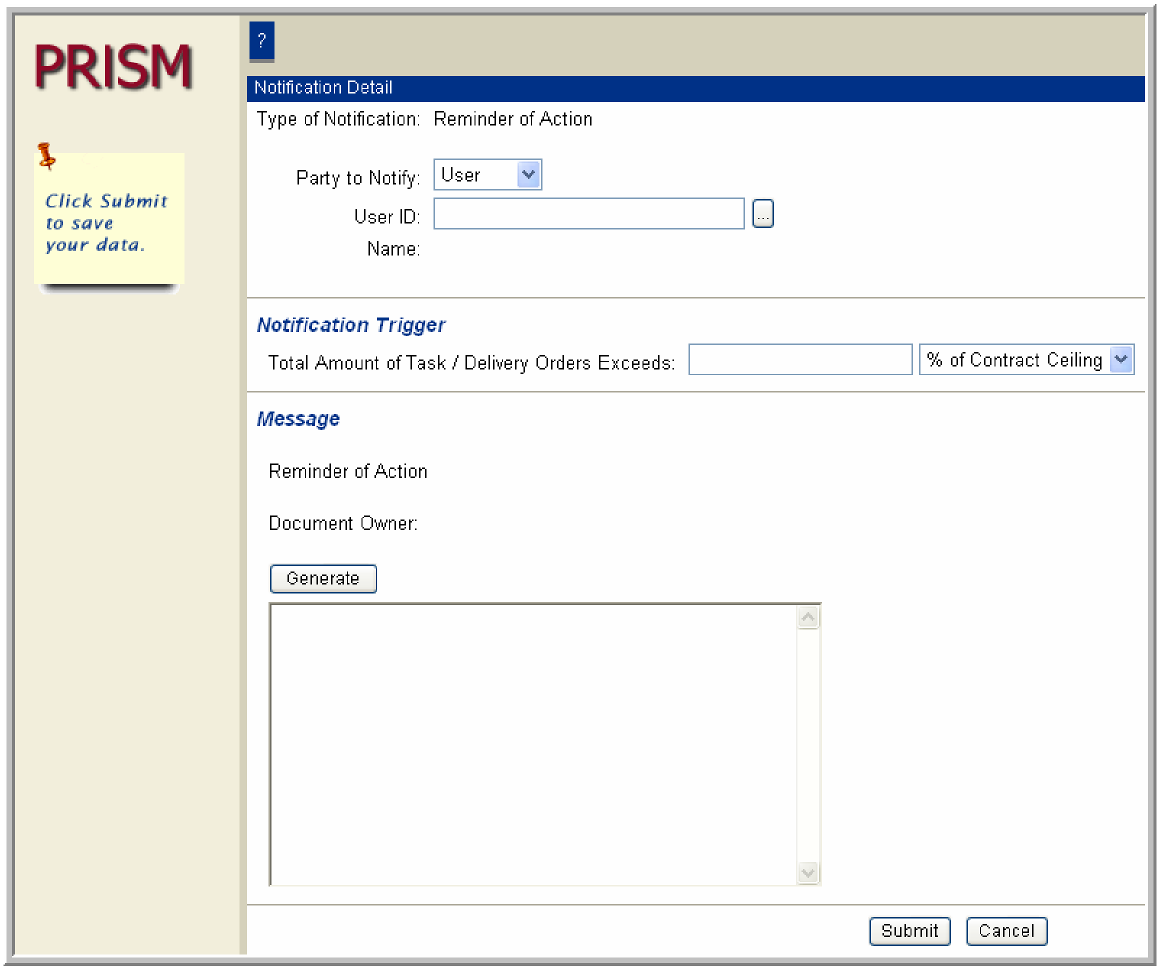
There is a new Notification Detail page in PRISM. Use this page to set up the notifications for limits on your contracts.

To access this page, follow these steps.

Note

The steps below describe one way to access this page, but there might be multiple ways.

1. From the PRISM Welcome page, open or create a contract. The General Information page displays.
2. Click **Limits** on the left menu. The Limits page displays.
3. Click the notification envelope for the *Contract Ceiling* field. The Notification Detail page displays.



Field Definitions

This table lists the fields on this page, and definitions of each.

Field Name	Description
Type of Notification	Displays the notification type that corresponds to the field you were using when you clicked the notification envelope.
Party to Notify	Select **User** if you want a PRISM user to receive the notification. If you select **User**, you must also type or select an ID in the *User ID* field. Select **External** if you want someone outside of PRISM to receive the notification. If you select **External**, you must also type the name of the person in the *Name* field, and type their email address in the *Email* field.
User ID	Displays if you select **User** in the *Party to Notify* field. Type or select the user ID of the PRISM user to whom you want to send the notification.

Field Name	Description
Name	Displays if you select **User** in the *Party to Notify* field. Pre-fills with the name of the PRISM user to whom you want to send the notification, according to your entry in the *User ID* field.
Note: There are two *Name* fields that might display, according to your selection in the *Party to Notify* field.	
Name	Displays if you select **External** in the *Party to Notify* field. Type the name of the person outside of PRISM to whom you want to send the notification.
Email	Displays if you select **External** in the *Party to Notify* field. Type the email address of the person outside of PRISM to whom you want to send the notification.
Notification Trigger	
Total Amount of Task / Delivery Orders Exceeds	Select **% of Contract Ceiling**, or **in Total**, and type the total amount on the blank field to the left of the drop-down list.
Message	
Document Owner	Displays the name of the PRISM user who owns this document. If you create a document, PRISM automatically considers you to be the document owner. Therefore, you have the right to view and edit the document. Other PRISM users can be granted shared ownership via the Preferences module.

Button Definitions

This table lists the button on this page, and its description.

Button Name	Description
Generate	Click to automatically generate the notification text, according to your selections in the fields on this page.
Submit	Click to save your work and return to the previous page.
Cancel	Click to return to the previous page without saving your work.

Your Notes

NG Pullback

PRISM has been enhanced so that you can access a read-only page that you can refresh with the most current FPDS-NG data for a version of an award. For example, if you access the FPDS-NG system and change your document reporting there, you can now go back into PRISM after you make your changes in FPDS-NG and click **Refresh** on the Review FPDS Record page to bring those changes into PRISM.

This enhancement applies to the following award types:

- Purchase orders.
- Contracts.
- Delivery orders/task orders.
- BPA setups.
- BPA calls.

Using the FPDS-NG Pullback Feature

This section describes the FPDS-NG Pullback enhancement and how it is used in PRISM.

Review FPDS Record Menu Option

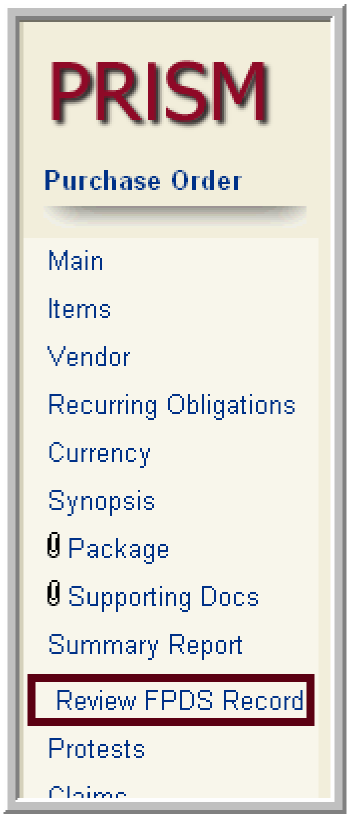
The Review FPDS Record menu option is new in PRISM. It is available for released documents after final approval in PRISM.

Review FPDS Record Page

The Review FPDS Record page is new in PRISM. It enables you to view the most current FPDS-NG data for a version of an award.

To access this page, follow these steps.

1. From the PRISM Welcome page, open a released award that has already been through final approval in PRISM. The General Information page displays.
2. Click **Review FPDS Record** on the left menu. The Review FPDS Record page displays.




Note

The **Review FPDS Record** menu option displays only when the award is released and a record exists in FPDS-NG in a final state.

The screen shot on the next page illustrates how this page might look at your agency.


PRISM

Field Definitions

This table lists the fields on this page and definitions of each.

Field Name	Definition
General Information	
Award Type	Displays the award type for the document. For example, if this is a purchase order, it displays `B - Purchase Order`.
Prepared By	Displays the name of the person who prepared the document.
Prepared Date	Displays the date on which the document was prepared.
Last Modified By	Displays the name of the person who last modified the document.
Last Modified Date	Displays the date on which the document was last modified.
Award ID	Displays the award identification code.
Agency ID	Displays your agency's PRISM system identification code.
PIID	Displays the Procurement Instrument Identifier (PIID) identification code.
Modification Number	Displays the document's modification number.
Transaction Number	Displays the document's transaction number.
Referenced IDV Agency ID	Displays the agency's referenced indefinite delivery vehicle (IDV) identification code. If one was not entered, displays `(None)`.
Reason for Modification	Displays the reason for the modification if this document is a modification to an award. If one was not entered, displays `(None)`.
Solicitation ID	Displays the solicitation identification code. If one was not entered, displays `(None)`.
Dates	
Date Signed	Displays the date on which the document was signed.
Effective Date	Displays the date on which the document was effective.
Completion Date	Displays the date on which the tasks on the award were completed.

Field Name	Definition
Estimated Ultimate Completion Date	Displays the date on which the tasks on the award are estimated to be complete.
Amounts	
Action Obligation	Displays the obligation amount for this action.
Base and Exercised Options Value	Displays the value of base and exercised options.
Base and All Option Value	Displays the value of base and all options.
Fee Paid for Use of IDV	Displays the fee paid for use of the indefinite delivery vehicle (IDV).
Purchaser Information	
Contracting Office Agency ID	Displays the contracting office's agency identification code.
Contracting Office ID	Displays the contracting office's identification code.
Funding Agency ID	Displays the funding agency's identification code.
Funding Office ID	Displays the funding office's identification code. If one was not entered, displays `(None)`.
Funded by Foreign Entity	Displays `Yes` if this award is funded by a foreign entity. Otherwise, displays `No`.
Reason for Inter-Agency Contracting	Displays the reason for inter-agency contracting. If one was not entered, displays `(None)`.
Contractor Information	
CCR Exception	Displays the CCR exception code. If one was not entered, displays `(None)`.
Name	Displays the contractor's full business name.
Doing Business As	Displays the contractor's doing-business-as name (usually a truncated version of the full business name that displays in the *Name* field). If one was not entered, displays `(None)`.

Field Name	Definition
Street Address 1	Displays the contractor's business address.
Street Address 2	Displays the contractor's business address. If one was not entered, displays `(None)`.
Street Address 3	Displays the contractor's business address. If one was not entered, displays `(None)`.
City	Displays the city in which the contractor's business is located.
State	Displays the state in which the contractor's business is located.
Zip Code	Displays the contractor's ZIP code.
Congressional District	Displays the congressional district in which the contractor's business is located. If one was not entered, displays `(None)`.
Country	Displays the country in which the contractor's business is located.
Phone	Displays the contractor's telephone number. If one was not entered, displays `(None)`.
Fax No	Displays the contractor's FAX number. If one was not entered, displays `(None)`.
DUNS No	Displays the contractor's DUNS number.
Socio Economic Data	
Veteran Owned	Displays `Yes` if the vendor's business is veteran-owned. Otherwise, displays `No`.
8(a) Firm	Displays `Yes` if the vendor's business is an 8(a) firm. Otherwise, displays `No`.
HUB Zone	Displays `Yes` if the vendor's business is a HUB Zone. Otherwise, displays `No`.
SDB	Displays `Yes` if the vendor's business is a small disadvantaged business. Otherwise, displays `No`.
JWOD (Sheltered Workshop)	Displays `Yes` if the vendor's business is a sheltered workshop. Otherwise, displays `No`.
HBCU	Displays `Yes` if the vendor's business is HBCU. Otherwise, displays `No`.

Field Name	Definition
Educational Institution	Displays `Yes` if the vendor's business is a school. Otherwise, displays `No`.
Woman Owned	Displays `Yes` if the vendor's business is woman-owned. Otherwise, displays `No`.
Asian Pacific American Owned Business	Displays `Yes` if the vendor's business is Asian Pacific American-owned. Otherwise, displays `No`.
Service Disabled Veteran	Displays `Yes` if the vendor's business is service disabled veteran-owned. Otherwise, displays `No`.
Local Government	Displays `Yes` if the vendor's business is local government-owned. Otherwise, displays `No`.
Minority Institution	Displays `Yes` if the vendor's business is a minority institution. Otherwise, displays `No`.
American Indian Owned Business	Displays `Yes` if the vendor's business is American Indian-owned. Otherwise, displays `No`.
State Government	Displays `Yes` if the vendor's business is veteran-owned. Otherwise, displays `No`.
Federal Government	Displays `Yes` if the vendor's business is a state government. Otherwise, displays `No`.
Minority Owned Business	Displays `Yes` if the vendor's business is minority-owned. Otherwise, displays `No`.
Tribal Government	Displays `Yes` if the vendor's business is a tribal government. Otherwise, displays `No`.
Black American Owned Business	Displays `Yes` if the vendor's business is Black American-owned. Otherwise, displays `No`.
Native American Owned Business	Displays `Yes` if the vendor's business is Native American-owned. Otherwise, displays `No`.
Subcontinent Asian (Asian Indian) American Owned Business	Displays `Yes` if the vendor's business is Subcontinent Asian American-owned. Otherwise, displays `No`.
Non-Profit Organization	Displays `Yes` if the vendor's business is a non-profit organization. Otherwise, displays `No`.

Field Name	Definition
Hispanic American Owned Business	Displays `Yes` if the vendor's business is Hispanic Americn-owned. Otherwise, displays `No`.
Emerging Small	Displays `Yes` if the vendor's business is an emerging small business. Otherwise, displays `No`.
Hospital	Displays `Yes` if the vendor's business is a hospital. Otherwise, displays `No`.
Organization Type	Displays the vendor's type of organization if one was selected. If one was not entered, displays `(None)`.
Number of Employees	Displays the number of employees working for the vendor.
Annual Revenue	Displays the vendor's annual revenue.
Contract Data	
Type of Contract	Displays the type of contract. For example, if this is a cost-no-fee contract, displays `S - Cost No Fee`.
Multi Year Contract	Displays `Yes` if this is a multi-year contract. Otherwise, displays `No`.
Major Program	Displays the agency's code for a major program within the agency.
Cost or Pricing Data	Displays the cost or pricing data for the award. If one was not entered, displays `(None)`.
Purchase Card Used as Payment Method	Displays `Yes` if a purchase card was used to pay for the goods or services. Otherwise, displays `No`.
Letter Contract	Displays `Yes` if this is a letter contract. Otherwise, displays `No`.
Performance Based Service Acquisition	Displays `Yes` if this is a performance-based service acquisition. Otherwise, displays `No`.
Contingency Humanitarian Peacekeeping Operation	Displays the type of humanitarian or peacekeeping operation. If one was not entered, displays `(None)`.
Contract Financing	Displays the type of contract financing. If one was not entered, displays `(None)`.

Field Name	Definition
Cost Accounting Standards Clause	Displays `Yes` if cost accounting standards clause applies to this document. Otherwise, displays `No`.
Number of Actions	Displays the number of actions on the award.
Consolidated Contract	Displays `Yes` if this is a consolidated contract. Otherwise, displays `No`.
Legislative Mandates	
Clinger Cohen Act	Displays `Yes` if the Clinger-Cohen Act applies to this document. Otherwise, displays `No`.
Service Contract Act	Displays `Yes` if the Service Contract Act applies to this document. Otherwise, displays `No`.
Walsh-Healey Act	Displays `Yes` if the Walsh-Healey Act applies to this document. Otherwise, displays `No`.
Davis Bacon Act	Displays `Yes` if the Davis-Bacon Act applies to this document. Otherwise, displays `No`.
Principal Place of Performance	
Principal Place of Performance Code (State, Location, Country)	Displays the location in which the services on the award are to be performed.
Congressional District Place of Performance	Displays the congressional district in which the services on the award are to be performed.
Place of Performance Zip Code(+4)	Displays the specific address at which the services on the award are to be performed.
Product or Service Information	
Product / Service Code	Displays the product or service code for the items on the award.
Principal NAICS Code	Displays the principal North American Industry Classification System (NAICS) code for the items on the award.
Bundled Requirements	Displays the agency's reason for bundling contract requirements. If one was not entered, displays `(None)`.

Field Name	Definition
System Equipment Code	Displays the system equipment code for the items on the award.
Country of Product Origin	Displays the country code for the country from which the items on the award were sent.
Place of Manufacture	Displays the country code for the country in which the items on the award were manufactured.
Use of Recovered Material	Displays the FAR clause that applies to the use of recovered material if recovered materials were included on the award.
Information Technology Commercial Item Category	Displays the IT category if the items are purchased for IT purposes.
Claimant Program Code	Displays the code from the DoD Procurement Coding Manual Section III, DoD Claimant Program Number.
Sea Transportation	Displays a code to indicate whether the contractor anticipates that some of the supplies being provided might be transported by sea.
GFE / GFP Provided Under This Action	Displays `Yes` if this award is for government furnished equipment or government furnished property. Otherwise, displays `No`.
Use of EPA Designated Products	Displays a code if the items being purchased are EPA-designated products. If one was not entered, displays `(None)`.
Description of Requirement	Displays a description of the items or services being purchased.

Field Name	Definition
Competition Information	
Extent Competed	Displays `A Full and Open Competition` if the action resulted from an award pursuant to FAR 6.102(a) - sealed bid, FAR 6.102(b) - competitive proposal, FAR 6.102(c) - Combination, or any other competitive method that did not exclude sources of any type. Displays `B Not Available for Competition` if the contract was not available for competition. Displays `C Not Competed` if the contract was not competed. Displays `D Full and Open Competition after exclusion of sources` if some sources were excluded before competition. Displays `E Follow On to Competed Action` if the action was a follow on to an existing competed contract. FAR 6.302-1. Displays `F Competed under SAT` if the action was competed under the Simplified Acquisition Threshold. Displays `G Not Competed under SAT` if the action is NOT competed under the Simplified Acquisition Threshold. Displays `CDO Competitive Delivery Order Apply to Full and Open Competition pursuant to FAR 6.1 and only apply to Delivery Orders` if the IDV type was a Federal Schedule and the delivery order/task order award permitted each contract awardee a fair opportunity to be considered, or if it was for the award of a multiple award schedule or an order against a multiple award schedule pursuant to FAR 6.102(d)(3). Displays `NDO Non-Competitive Delivery Order` if the award was noncompetitive.

Field Name	Definition
Solicitation Procedures	Displays `NP Negotiated Proposal` if the contract awarded over $100K and used negotiated procedures. Displays `SB Sealed Bid` if contract awarded over $100K and used sealed bidding procedures. Displays `TS Two Step` if the contract awarded over $100K and used a combination of sealed bids and negotiated procedures. Displays `SP1 Simplified Acquisition` if the contract was awarded via competitive acquisition and used the simplified acquisition procedures in FAR 13. Displays `AE Architect – Engineer` if the action resulted from selection of sources for architect-engineer contracts as defined in FAR 6.102(d)(1). Displays `BR Basic Research` if the action resulted from competitive selection of basic research proposals as defined in FAR 6.102(d)(2). Displays `AS Alternative Sources` if the action resulted from the use of procedures that provide for full and open competition after exclusion of sources to reduce overall costs as defined in FAR 6.202(a)(1), to have a facility available for national defense or industrial mobilization as defined in FAR 6.202(a)(2), to establish or maintain an essential engineering, research, or development capability as defined in FAR 6.202(a)(3), to ensure the continuous availability of a reliable source of supply for such property or service as defined in FAR 6.202(a)(4), to satisfy projected needs for such product or service based on a history of high demand as defined in FAR 6.202(a)(5), to satisfy a critical need for medical, safety, or emergency supplies as defined in FAR 6.202(a)(6). Displays `SP2 Simplified Acquisition Procedures - Non-Competitive` if the action was non-competitive and only for a delivery order when the simplified acquisition procedures in FAR 13 were used.
Type of Set Aside	Displays the type of set-aside for reporting.
Evaluated Preference	Displays the type of evaluated preference for reporting.
Research	Displays the type of research used for reporting. If one was not entered, displays `(None)`.

Field Name	Definition
Statutory Exception to Fair Opportunity	Displays the type of statutory exception to Fair Opportunity used for reporting. If one was not entered, displays `(None)`.
Reason Not Competed	Displays the code to explain why the solicitation was not competed.
Number of Offers Received	Displays the numbers of offers received.
Small Business Competitiveness Demonstration Program	Displays `Yes` if the small business competitiveness demonstration program applies to this award. Otherwise, displays `No`.
Commercial Item Test Program	Displays `Yes` if the commercial test program applies to this award. Otherwise, displays `No`.
Commercial Item Acquisition Procedures	Displays `Yes` if commercial item acquisition procedures were followed for this award. Otherwise, displays `No`.
Pre Award FBO Synopsis	Displays `Yes` if there was a pre-award FBO synopsis. Otherwise, displays `No`.
SBA / OFPP Synopsis Waiver Pilot	Displays `Yes` if the contract was awarded under the SBA/OFPP synopsis waiver pilot program. Otherwise, displays `No`.
Alternative Advertising	Displays `Yes` if alternative advertising was used for the award. Otherwise, displays `No`.
A76 Action	Displays `Yes` if A76 action was used for the award. Otherwise, displays `No`.
Preference Programs / Other Data	
Contracting Officer's Business Size Selection	Displays the contracting officer's business size selection.
Subcontract Plan	Displays the subcontract plan. If one was not entered, displays `(None)`.
Price Evaluation Percent Difference	Displays the price evaluation percent difference. If one was not entered, displays `(None)`.

Field Name	Definition
Reason Not Awarded to Small Disadvantaged Business	Displays the reason why the contract was not awarded to a small disadvantaged business. If one was not entered, displays `(None)`.
Reason Not Awarded to Small Business	Displays the reason why the contract was not awarded to a small business. If one was not entered, displays `(None)`.
Agency Specific Data	
Offeror's Proposal Number	Displays the offeror's proposal number. If one was not entered, displays `(None)`.
PR Number	Displays the agency's purchase request number. If one was not entered, displays `(None)`.
Accession Number	Displays the agency's accession number. If one was not entered, displays `(None)`.
Installation Unique	Displays the agency's installation unique code. If one was not entered, displays `(None)`.
Administrator Code	Displays the agency's administrator code. If one was not entered, displays `(None)`.
Contracting Officer Code	Displays the agency's contracting officer code. If one was not entered, displays `(None)`.
Negotiator Code	Displays the agency's negotiator code. If one was not entered, displays `(None)`.
Organization Code	Displays the agency's organization code. If one was not entered, displays `(None)`.
COTR Name	Displays the contracting officer's technical representative's code. If one was not entered, displays `(None)`.
Procurement Placement Code	Displays the agency's procurement placement code. If one was not entered, displays `(None)`.
Contract Fund Code	Displays the agency's contract fund code. If one was not entered, displays `(None)`.

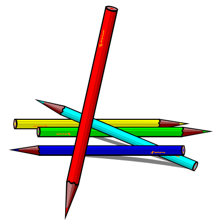
Field Name	Definition
Management Reporting Requirements	Displays the agency's managing reporting requirements code. If one was not entered, displays `(None)`.
Accounting Installation Number	Displays the agency's accounting installation number. If one was not entered, displays `(None)`.
Field of Science or Engineering	Displays the agency's field of science or engineering. If one was not entered, displays `(None)`.
Contract Administrations Delegated	Displays the agency's delegated contract administrations. If one was not entered, displays `(None)`.
Closeout PR	Displays `Yes` if this is the agency's closeout purchase request. Otherwise, displays `No`.
Advisory Assistance Services Contract	Displays `Yes` if this is the agency's advisory assistance services contract. Otherwise, displays `No`.
Support Services Type Contract	Displays `Yes` if this is the agency's support services type contract. Otherwise, displays `No`.
New Technology or Patent Rights Clause	Displays `Yes` if this is the new technology or patent rights clause applies to this contract. Otherwise, displays `No`.
Property Financial Reporting	Displays `Yes` if this is the agency's property financial reporting. Otherwise, displays `No`.
Value Engineering Clause	Displays `Yes` if this is the value engineering clause applies to this contract. Otherwise, displays `No`.
Security Code	Displays `Yes` if a security code was required for the contract. Otherwise, displays `No`.
Is Physically Complete	Displays `Yes` if this contract is physically complete. Otherwise, displays `No`.
Physical Completion Date	Displays the date on which the contract was physically complete. If one was not entered, displays `(None)`.
Final Invoice Paid Date	Displays the date on which the final invoice was paid. If one was not entered, displays `(None)`.

Field Name	Definition
Funded Through Date	Displays the date through which the contract was funded. If one was not entered, displays `(None)`.
Solicitation Issue Date	Displays the date on which the solicitation was issued. If one was not entered, displays `(None)`.
Cancellation Date	Displays the date on which the contract will be cancelled. If one was not entered, displays `(None)`.
Destroy Date	Displays the date on which the contract will be destroyed. If one was not entered, displays `(None)`.
Principal Investigator	Displays the agency's principal investigator. If one was not entered, displays `(None)`.
Alternate Principal Investigator	Displays the agency's alternate principal investigator. If one was not entered, displays `(None)`.
Other Statutory Authority	Displays the agency's other statutory authority. If one was not entered, displays `(None)`.

Button Definitions

This table lists the new button on this page and its definition.

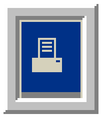
Button Name	Description
Refresh	To access the updated information from FPDS-NG, click **Refresh**. PRISM retrieves the data and stores it back in a PRISM database.



Your Notes

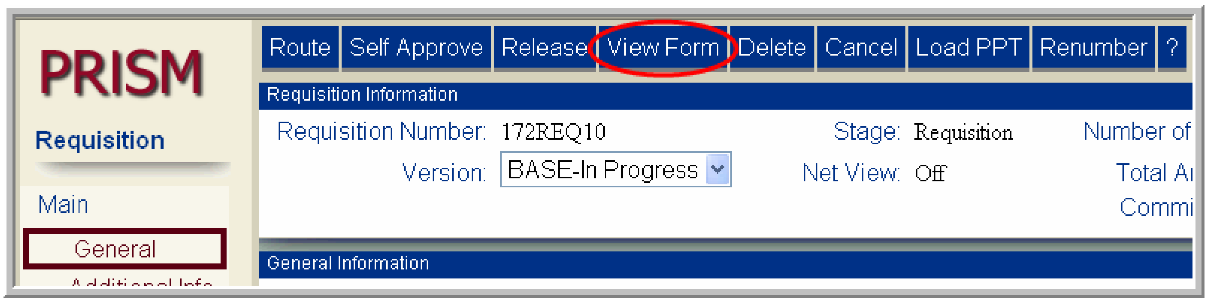
Printer Icon

The **View Form** button was replaced with a printer icon on most pages in PRISM. Use the printer icon to generate PDF copies of your forms. It looks like this:



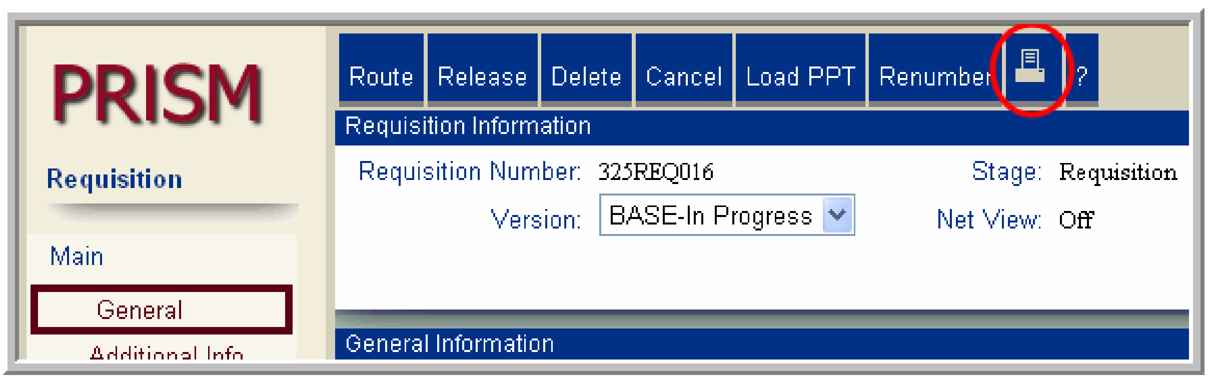
Before

This is how the print form functionality might have looked at your agency before this enhancement.



After

This is how the print form functionality might look at your agency after this enhancement.



Your Notes

Routing Changes

The PRISM routing process has been enhanced. Before this enhancement, PRISM did not stop the routing process for a reviewer route role unless the reviewer was in the first sequence on the route list.

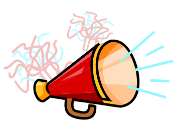
After this enhancement, the reviewer role has been split into two functions and updated as follows:

- *Reviewer:* This role stops the route until they click **Mark Reviewed**.
- *Courtesy Copy:* This role does not stop the route, it is set up for “FYI” copies.

Additionally, the Private Routing List page at the administrator’s level has been updated to be more consistent with the Private Routing List page at the document-level.

Notes

- Reviewers must review the document before the document is sent to the next person on the route.
- The reviewer role is similar in system performance to the approver role except that PRISM does not check the reviewer’s threshold limit.
- The courtesy copy reviewers do not need to review the document before the document is sent to the next person on the route.



Important!

When your agency installs this new functionality in PRISM, an installation script updates your agency’s existing routing lists as follows:

- The reviewer set up in first sequence in a route will still be set up as a reviewer and that role will function as per this new enhancement (stop the route until the document is marked reviewed).
- Reviewers in sequence 2 and higher will be changed from the old reviewer role to the new courtesy copy role.

System Setup

This section includes the setup necessary to use this new functionality.

Reminder

Just a quick reminder… To set up route roles:

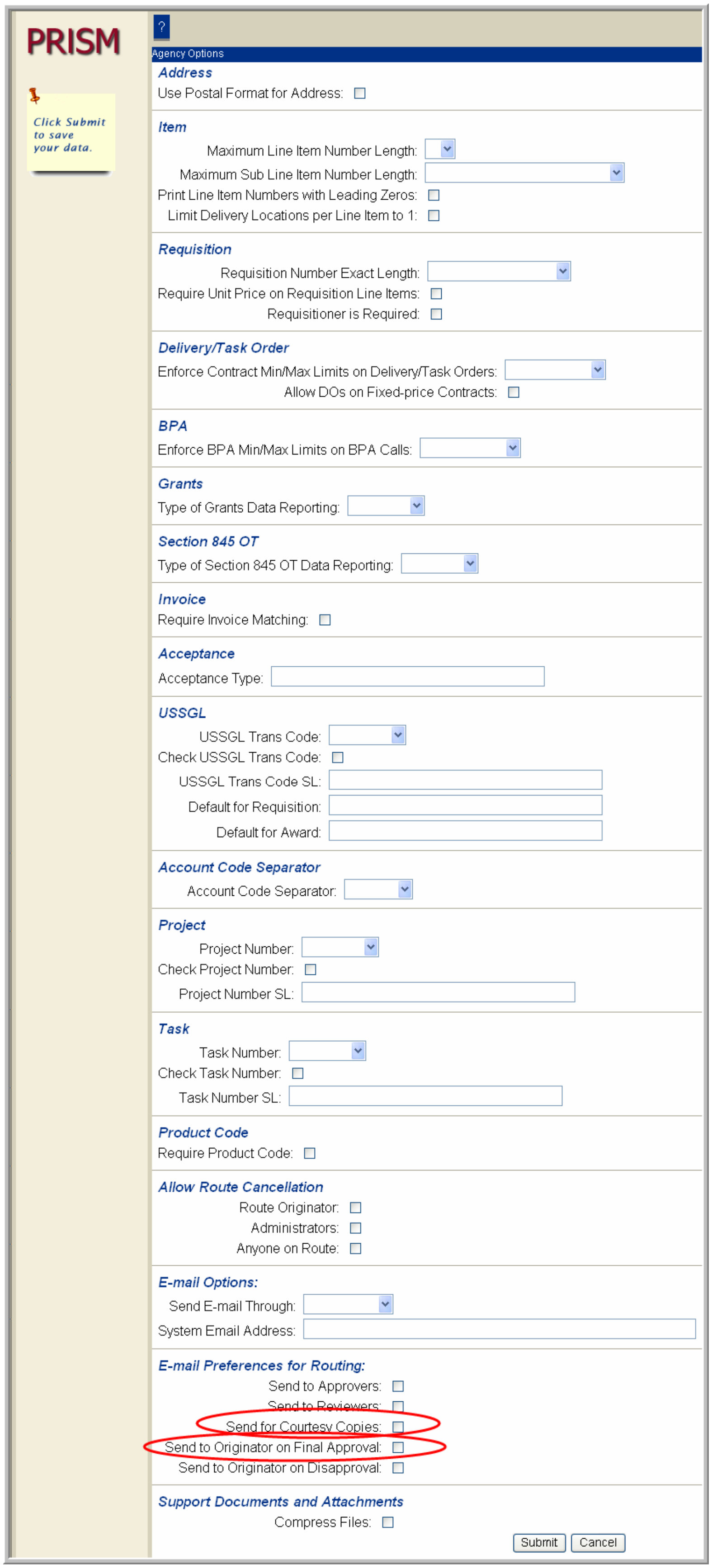
1. Click **System Setup** on the left menu.
2. Click **Agency** on the left menu. The Agency Codes Summary page displays.
3. Select **Route Role** in the *Agency Code Type* field.
4. Click **Add** to add a new route role, or select one from the list and click **Edit**.

Agency Options Page

The *Send for Courtesy Copies* and *Send to Originator on Final Approval* fields are new in the E-mail Preferences for Routing section on the Agency Options page. Use them to set up PRISM to send these new notifications when you route your documents.

To access this page, follow these steps.

1. From the PRISM Welcome page, click **System Setup** on the left menu.
2. Click **Sys Configuration** on the left menu. The Site Selection page displays.
3. Click **Agency** on the left menu. The General Summary page displays.
4. Click **Options** on the left menu. The Options Summary page displays.
5. Click **Edit** on the blue toolbar. The Agency Options page displays. (See screen shot, next page.)


PRISM
Click Submit to save your data.
Agency Options
Address
Use Postal Format for Address:
Item
Maximum Line Item Number Length:
Maximum Sub Line Item Number Length:
Print Line Item Numbers with Leading Zeros:
Limit Delivery Locations per Line Item to 1:
Requisition
Requisition Number Exact Length:
Require Unit Price on Requisition Line Items:
Requisitioner is Required:
Delivery/Task Order
Enforce Contract Min/Max Limits on Delivery/Task Orders:
Allow DOs on Fixed-price Contracts:
BPA
Enforce BPA Min/Max Limits on BPA Calls:
Grants
Type of Grants Data Reporting:
Section 845 OT
Type of Section 845 OT Data Reporting:
Invoice
Require Invoice Matching:
Acceptance
Acceptance Type:
USSGL
USSGL Trans Code:
Check USSGL Trans Code:
USSGL Trans Code SL:
Default for Requisition:
Default for Award:
Account Code Separator
Account Code Separator:
Project
Project Number:
Check Project Number:
Project Number SL:
Task
Task Number:
Check Task Number:
Task Number SL:
Product Code
Require Product Code:
Allow Route Cancellation
Route Originator:
Administrators:
Anyone on Route:
E-mail Options:
Send E-mail Through:
System Email Address:
E-mail Preferences for Routing:
Send to Approvers:
Send to Reviewers:
Send for Courtesy Copies:
Send to Originator on Final Approval:
Send to Originator on Disapproval:
Support Documents and Attachments
Compress Files:
Submit
Cancel

Field Definitions

This table lists the new fields on this page, and definitions of each.

Note

These fields are disabled and values cleared if you set the *Send Email Through* field on this page to **None**.

Field Name	Description
Send for Courtesy Copies	Check the box if you want PRISM to send an email in addition to the PRISM Inbox message to the courtesy copy reviewer when the document is routed.
Send to Originator on Final Approval	Check the box if you want PRISM to send an email notification to the originator when the routed document is final-approved.

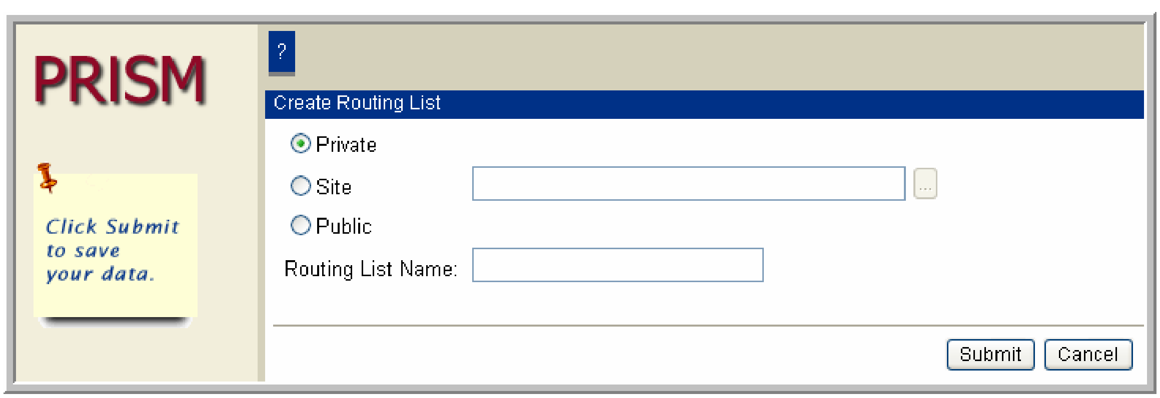
Create Routing List Page

To support the enhancements to the PRISM routing process, this page was relabeled to Create Routing List (was labeled Routing List For) and the *Routing Order* field was removed and replaced by the **Move** button on the Private Routing List page. The functionality from the *Routing Order* field which enabled you to move a user to a specific location in a route list was incorporated into the Move Sequence page (see Move Sequence Page).

To access this page, follow these steps.

1. From the PRISM Welcome page, click **System Setup** on the left menu.
2. Click **Routing Lists** on the left menu. The Route List Maintenance page displays.
3. Click **Add** on the blue toolbar. The Create Routing List page displays.

This is how this page might now look at your agency.



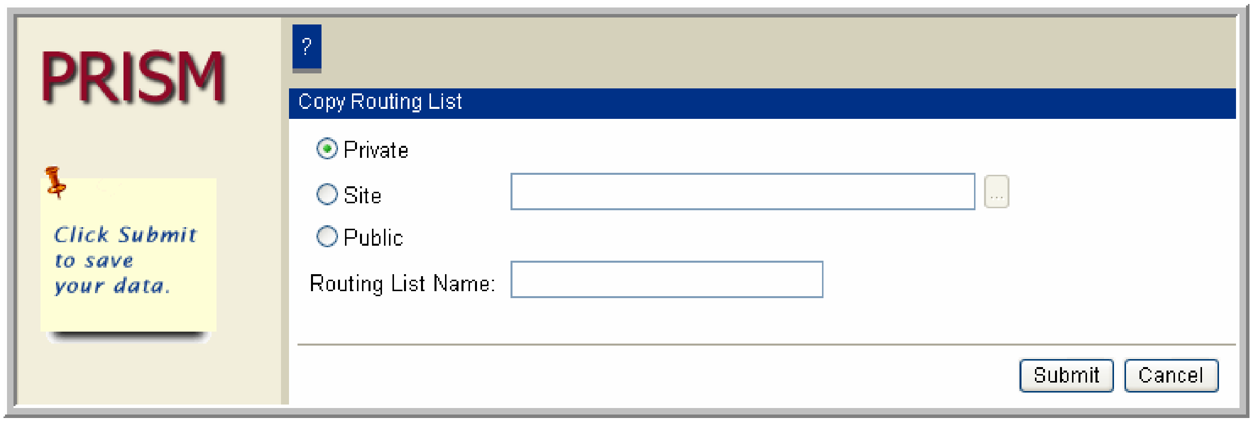
Copy Routing List Page

To support the enhancements to the PRISM routing process, the *Routing Order* field was removed from this page.

To access this page, follow these steps.

1. From the PRISM Welcome page, click **System Setup** on the left menu.
2. Click **Routing Lists** on the left menu. The Route List Maintenance page displays.
3. Select a routing list and click **Copy** on the blue toolbar. The Copy Routing List page displays.

This is how this page might now look at your agency.



Move Sequence Page

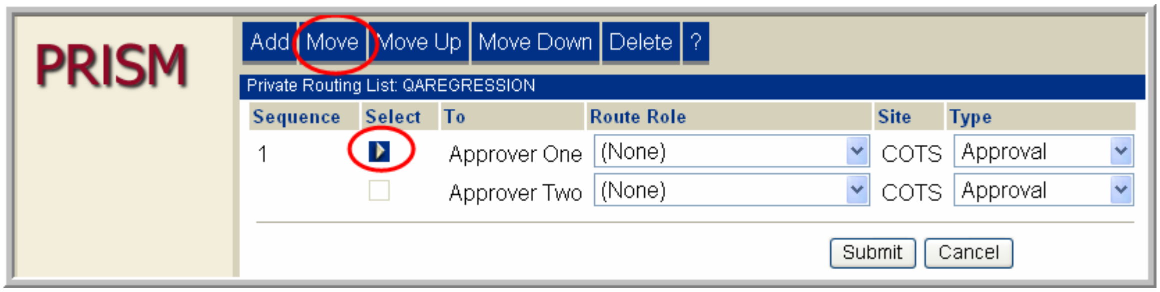
This page was added to PRISM to support the enhancements to the routing process. Use it to move a user to a location higher or lower than another sequence number in a routing list.

Note

This page was also added in the Preferences module (Preferences | Routing Lists | select routing list and Edit | select user and Move), and at the document level (open or create document | Route | select user and Move).

To access this page, follow these steps.

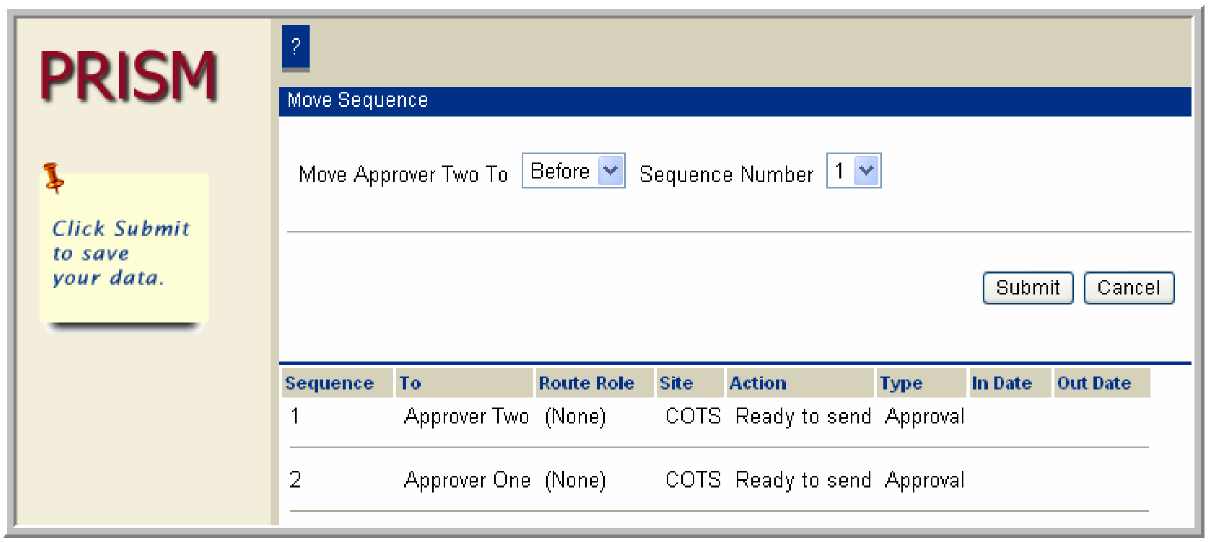
1. From the PRISM Welcome page, click **System Setup** on the left menu.
2. Click **Routing Lists** on the left menu. The Route Lists Maintenance page displays.
3. Click **Add**, or select a route from the list and click **Edit**. The Private Routing List page displays.
4. Select the user you want to move into another position in the list and click **Move** on the blue toolbar. The Move Sequence page displays.



Note

The **Move** button does not display on the blue toolbar unless there are two or more users in the routing list.

This is how the Move Sequence page might look at your agency.



Field Definitions

This table lists the fields on this page, and definitions of each.

Field Name	Description
Move [user name] To	Select **Before** if you want to move the user to a spot before a sequence number. Select **Within** if you want to move the user to a spot within a sequence number. Select **After** if you want to move them after a sequence number.
Sequence Number	Select the number which corresponds to the location in the sequence to which you want to move the user.

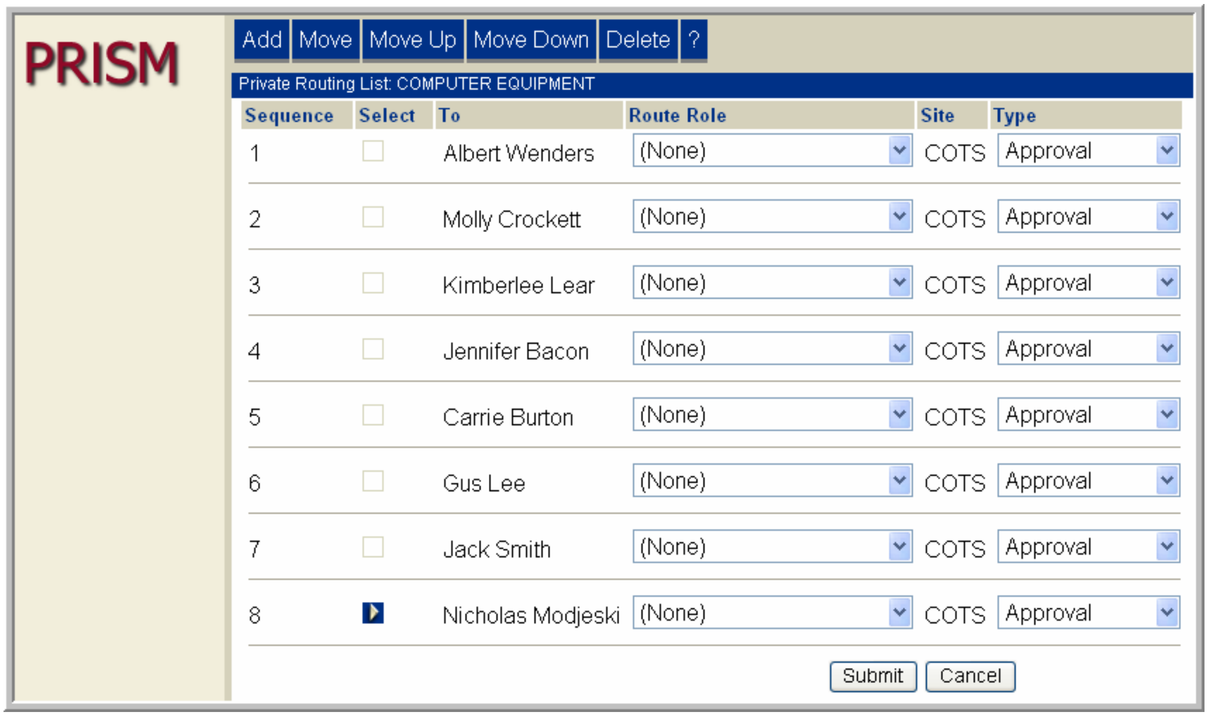
Column Definitions

This table lists the columns on this page, and definitions of each.

Field Name	Description
Sequence	Displays a numbered list of users set up in the route list. The sequence number is used to route the document from user to user.
To	Displays the name of the user to whom the document is to be routed in each sequence.
Route Role	Displays the user's route role as set up for your agency. For example, `Approver1` might display if your agency has set that label up as an approver route role. A user can be listed more than once to fill more than one role.
Site	Displays the site for which the route list is set up.
Action	Displays a message to indicate where the document is at in the routing process. Displays `Ready to be Sent` if the document has not yet been routed. Other actions that might display include `Sent`, `Opened`, `Approved`, `Reviewed`.
Type	Displays `Approval` if PRISM is set up to route documents to the user for their approval. Displays `Courtesy Copy` if PRISM is set up to send the user an FYI/courtesy copy. Displays `Review` if PRISM is set up to route documents to the user for their review.
In Date	Displays the date on which the document was routed to each user in the list.
Out Date	Displays the date on which the document was routed to the next user in the list.

Examples – Move Sequences

This section includes examples of moving users before, within, and after other users in a route list. This is a screen shot of the route list used in the move sequence sample screen shots.

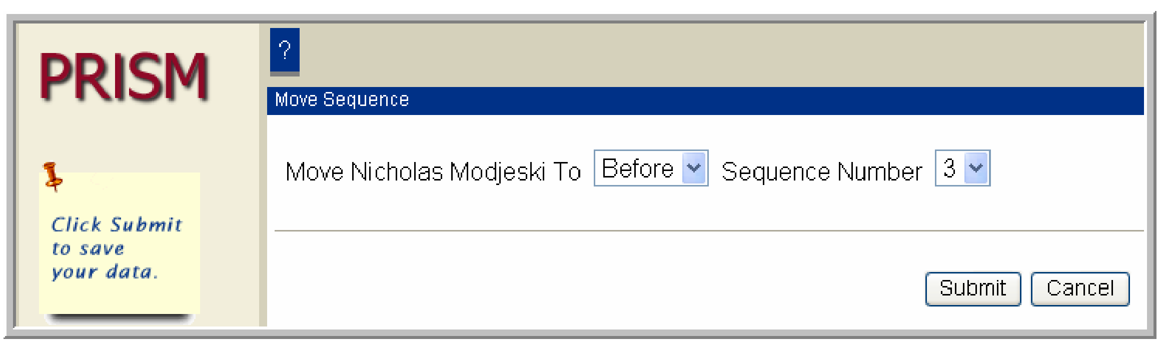


Example Move Sequence – Before

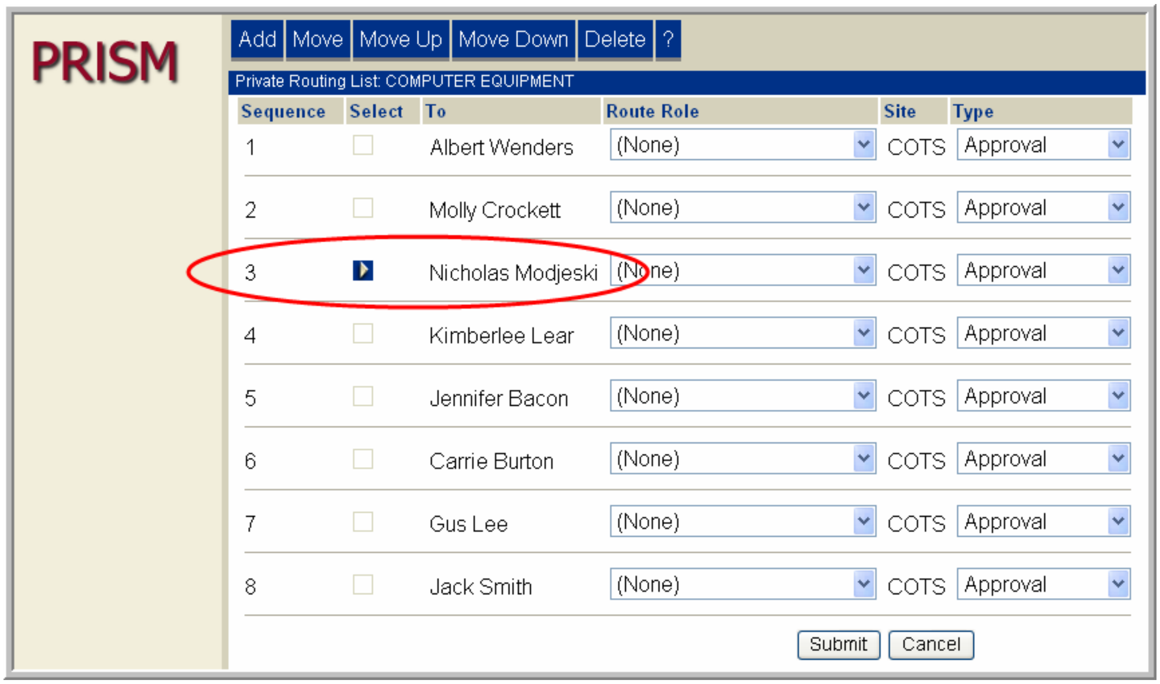
Let's say you want to move Nicholas Modjeski from the last position (position 8) in the route list to the position before Kimberlee Lear.

The steps to do so might look something like this:

1. Select **Nicholas Modjeski** from the list, and click **Move** on the blue toolbar. The Move Sequence page displays.
2. Select **Before** in the *Move [user name] To* field, and **3** in the *Sequence Number* field because Kimberlee Lear is in position 3 in the route list.



3. Click **Submit**. The Private Routing List page displays. Nicholas Modjeski is now in position 3 in the route list.

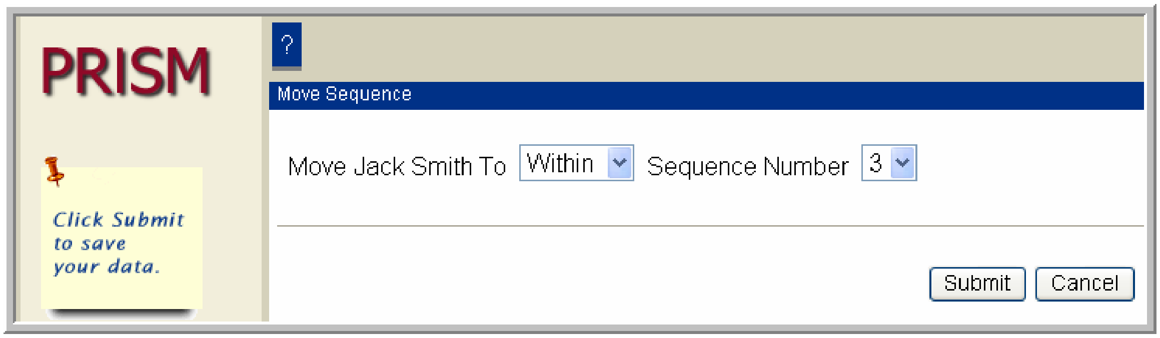


Example Move Sequence – Within

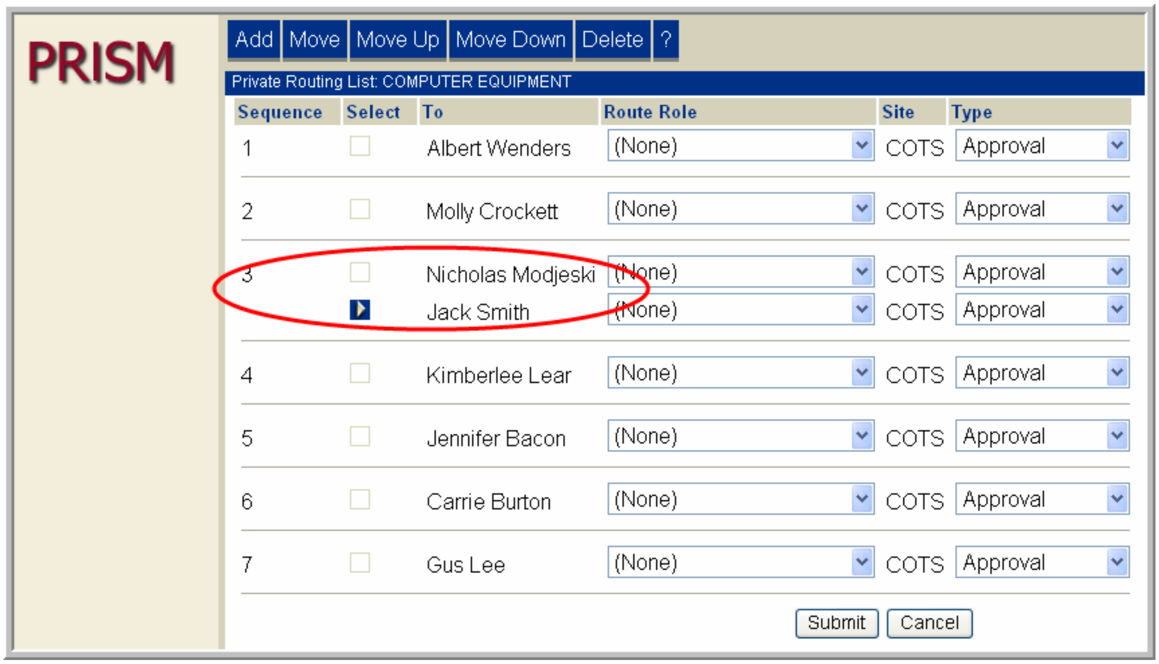
Let's say you want to move Jack Smith and Molly Crockett to positions within sequence 3 so they receive documents at the same time as Nicholas Modjeski, who is now in sequence 3.

The steps to do so might look something like this:

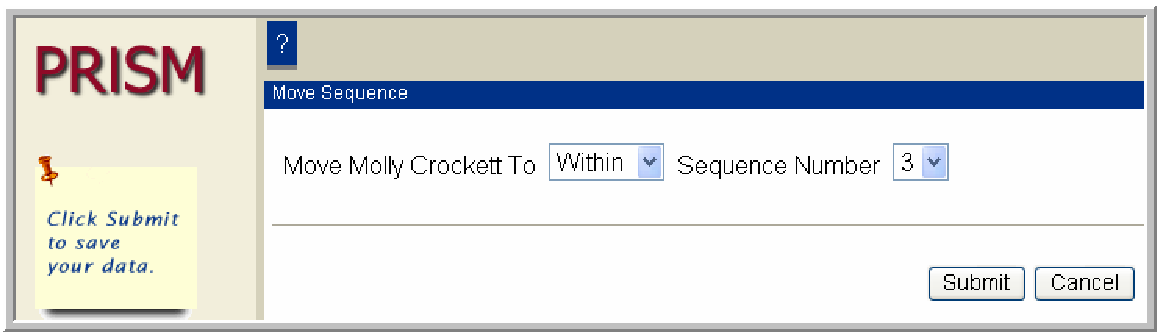
1. Select **Jack Smith** from the list, and click **Move** on the blue toolbar. The Move Sequence page displays.
2. Select **Within** in the *Move [user name] To* field, and **3** in the *Sequence Number* field.



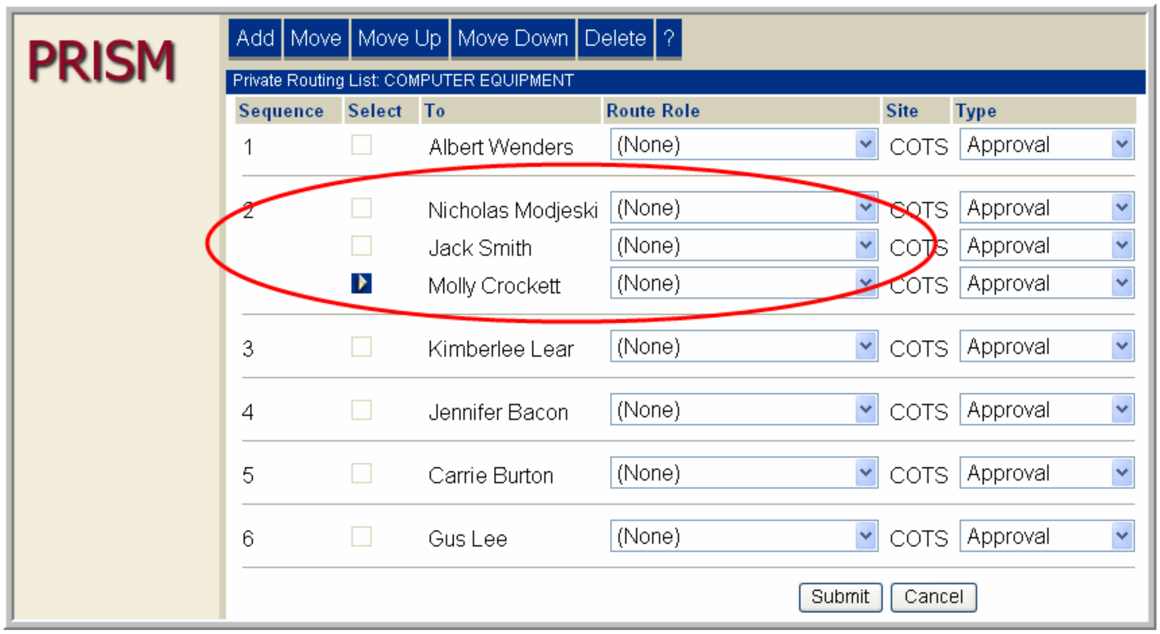
3. Click **Submit**. The Private Routing List page displays. Jack Smith now shares position 3 in the route list with Nicholas Modjeski.



4. Now it's time to move Molly Crockett into the same sequence. Select Molly Crockett from the list and click **Move** on the blue toolbar. The Move Sequence page displays.



5. Click **Submit**. The Private Routing List page displays. Molly Crockett now shares position 3 in the route list with Nicholas Modjeski and Jack Smith.

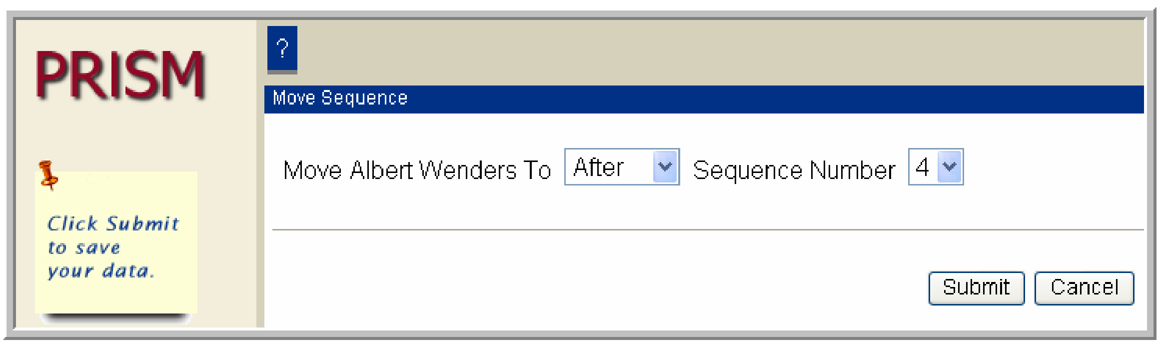


Example Move Sequence – After

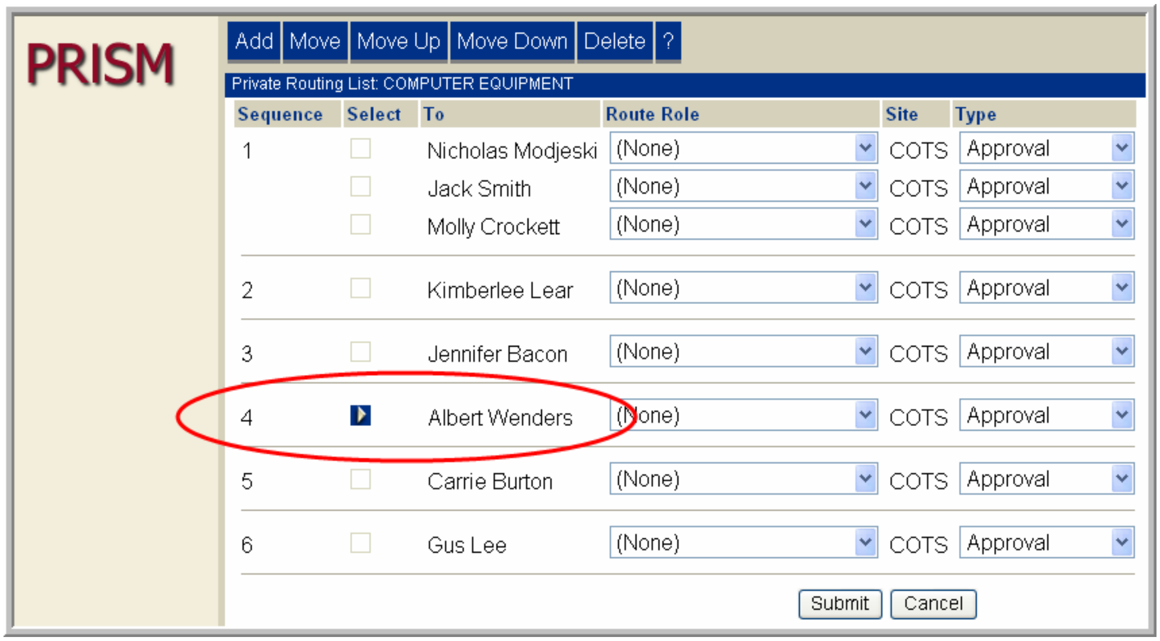
Let's say you want to move Albert Wenders from sequence 1 to a position in the route list after Jennifer Bacon, who is in sequence 4.

The steps to do so might look something like this:

1. Select **Albert Wenders** from the list, and click **Move** on the blue toolbar. The Move Sequence page displays.
2. Select **After** in the *Move [user name] To* field, and **4** in the *Sequence Number* field.



3. Click **Submit**. The Private Routing List page displays. Albert Wenders is now in position 5 in the route list.

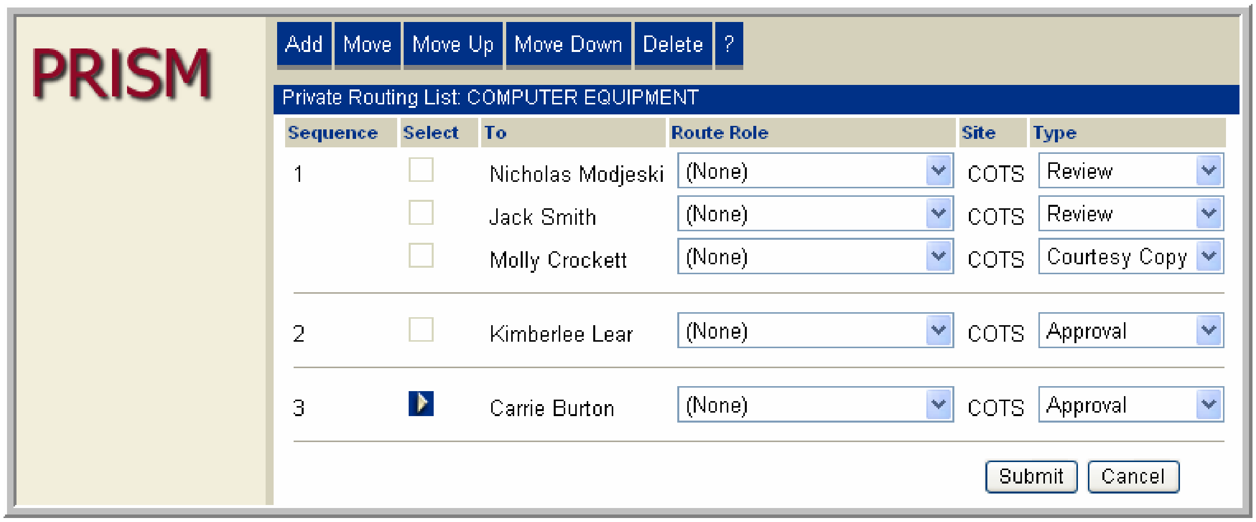


Examples – Setting Up Reviewers and Courtesy Copy Recipients

This section includes an example of setting up users as reviewers, courtesy copy recipients, and approvers. Let's say you want to set up a routing list for computer equipment. Some of the users from your agency need to review the documents routed to them and mark them reviewed, others need only to read it (courtesy copy), and others need to look documents over carefully to approve them.

In this hypothetical routing list, the following users must be set up in the Computer Equipment routing list.

Team	Team Members	Explanation
IT	Nicholas Modjeski Jack Smith Molly Crockett	Nicholas, Jack, and Molly are on the IT team. They answer to Kimberlee Lear, the IT Manager.
Management	Kimberlee Lear	Kimberlee is the IT Manager. She answers to Carrie Burton, the CFO.
CFO	Carrie Burton	Carrie is the CFO and decides how agency money is spent (or not!).



In the screen shot above, Nicholas and Jack are set up as reviewers because they have been on the IT team for several years and have some industry certifications that make them experts in different IT-related fields. When requests come in for new computer equipment or software, their manager (Kimberlee Lear) wants them to know about it, and wants them to review requests because she trusts their technical expertise.

Molly is set up to receive a courtesy copy because she is newer on the team, has less experience, and needs to stay in the loop but does not necessarily have the expertise to dictate whether an IT purchase is wise or not.

Kimberlee is set up as an approver and must be sure that the software and equipment for which her team are responsible for setting up and maintaining is the best the industry offers. She might use comments from Nicholas and Jack to help decide whether to approve or disapprove a document.

Carrie is set up as an approver because it is her job to decide whether funds from her agency will be spent on items that are sent to her for approval.

Private Routing List Page

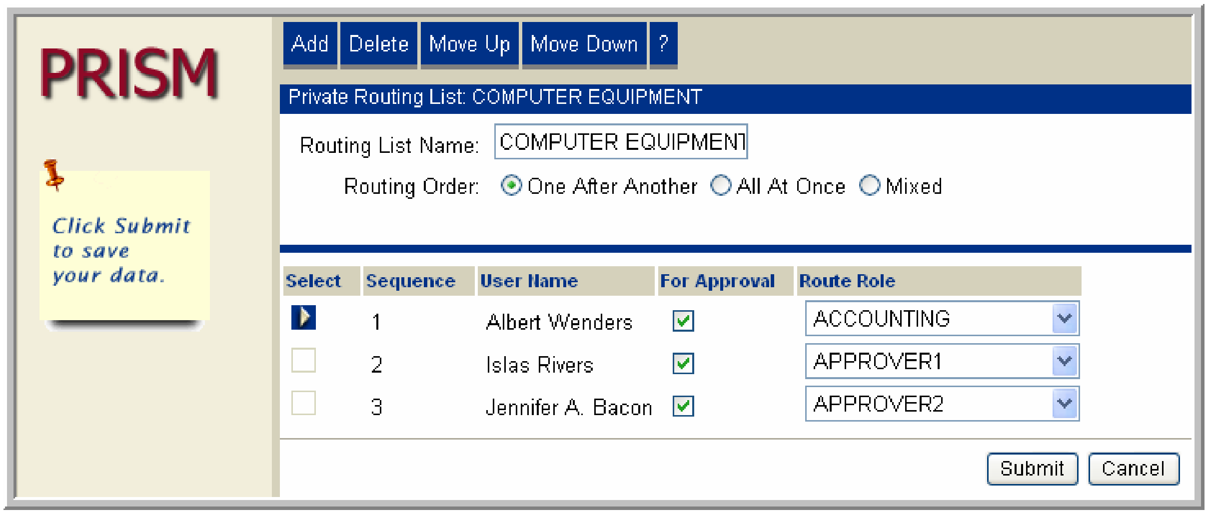
The following changes have been made to this page to support the enhancements to the PRISM routing process:

- The **Delete** button on the blue toolbar was moved to the left of the online help button.
- The *Routing Order* field was removed.
- The *Sequence* column was moved to the far left and displays the sequence number only at the first node in one sequence, just as PRISM does at the document-level on the Route page.
- The *For Approval* column was removed.
- The *Type* column was added to the routing table.
- The *User Name* column was relabeled as *To*.
- The **Move** button was added to the blue toolbar.

- PRISM now hides the **Move Up** and **Move Down** buttons on the blue toolbar when there are less than two route sequences in the list.

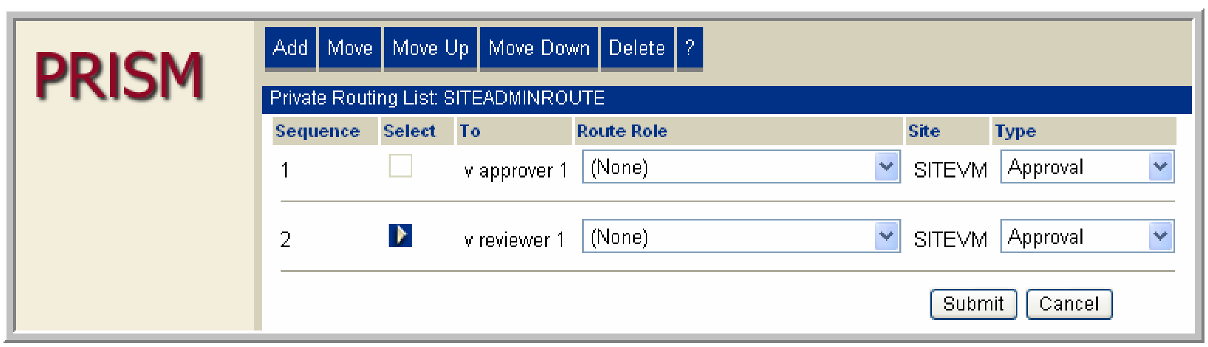
Before

This screen shot illustrates how this page might have looked at your agency before these changes.



After

This screen shot illustrates how this page might look at your agency after these changes.



To access this page, follow these steps.

1. From the PRISM Welcome page, click **System Setup** on the left menu.
2. Click **Routing Lists** on the left menu. The Route Lists Maintenance page displays.
3. Click **Add** on the blue toolbar. The Create Routing List page displays.

Column Definitions

This table lists the new column on this page, and its description.

Column Name	Description
Type	For each user in the list, select: • **Review** if you want to set them up as a reviewer. • **Approval** if you want to set them up as an approver. • **Courtesy Copy** if you want to set up to receive courtesy copies. The default setting for this field is **Approval**.

Button Definitions

This table lists the new button on this page, and its description.

Button Name	Description
Move	Displays when there are at least two users in the routing list. To move a user to a location higher or lower than another sequence number in the list, select their name, and click **Move** on the blue toolbar. The Move Sequence page displays.

Preferences

This section describes the enhancements made to the Preferences module to support this new functionality.

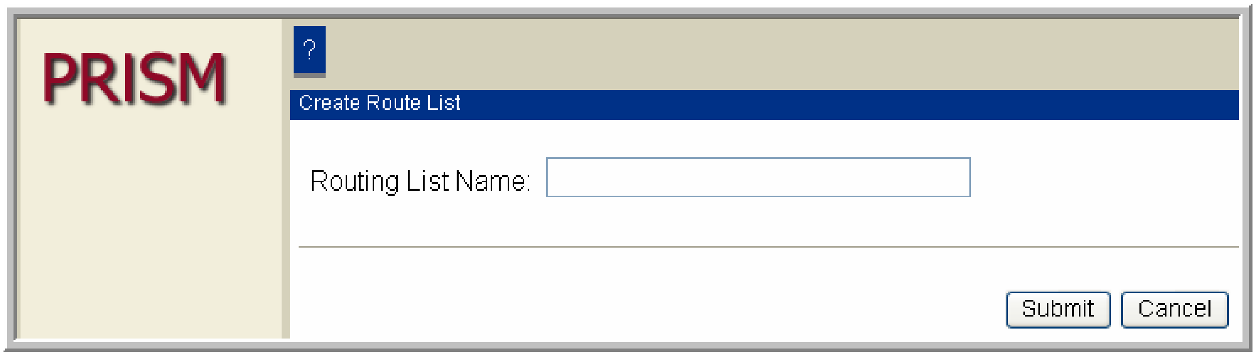
Create Route List Page

The *Routing Order* field was removed from this page to support the enhancements to the PRISM routing process:

To access this page, follow these steps.

1. From the PRISM Welcome page, click **Preferences** on the left menu. The General Preferences Summary page displays.
2. Click **Routing Lists** on the left menu. The Routing Lists page displays.
3. Click **Add** on the blue toolbar. The Create Route List page displays.

This is how this page might now look at your agency.



Routing List Page

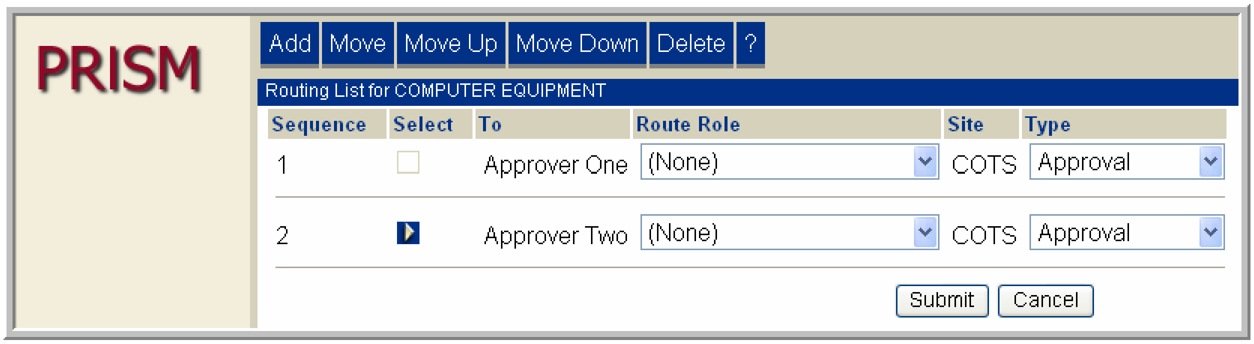
The following changes were made to this page to support the enhancements to the PRISM routing process:

- The read-only *Routing Order* field was removed and replaced by the **Move** button on the Private Routing List page. The functionality from the *Routing Order* field which enabled you to move a user to a specific location in a route list was incorporated into the Move Sequence page (see Move Sequence Page).
- The **Add Approver** and **Add Reviewer** buttons were removed. They were replaced by the **Add** button, in which their functionality was combined.
- The *Type* column was moved to the end of the columns.
- The *Type* column was changed to read-write so you can specify the route type for the route nodes you set up. Also, it includes a dropdown list from which you can select **Approval**, **Review**, or **Courtesy Copy**.
- The **Move Up** and **Move Down** buttons do not display if there are less than two users on the route.
- The **Move** button was added to this page so you can move a reviewer or approver to a specific location on the route.

To access this page, follow these steps.

1. From the PRISM Welcome page, click **Preferences** on the left menu. The General Preferences Summary page displays.
2. Click **Routing Lists** on the left menu. The Routing Lists page displays.
3. Select a routing list and click **Edit**. The Routing List page displays.

This is how this page might now look at your agency.



Button Definitions

This table lists the new button on this page, and its description.

Button Name	Description
Add	Click to access the Add User to Route List page, on which you can select from a list of PRISM users. These are the people on the route to whom the document is routed for review and/or approval during the procurement process.
Move	Displays when there are at least two users on the routing list. To move a user to a location higher or lower than another sequence number in the list, select their name, and click **Move** on the blue toolbar. The Move Sequence page displays.

Inbox

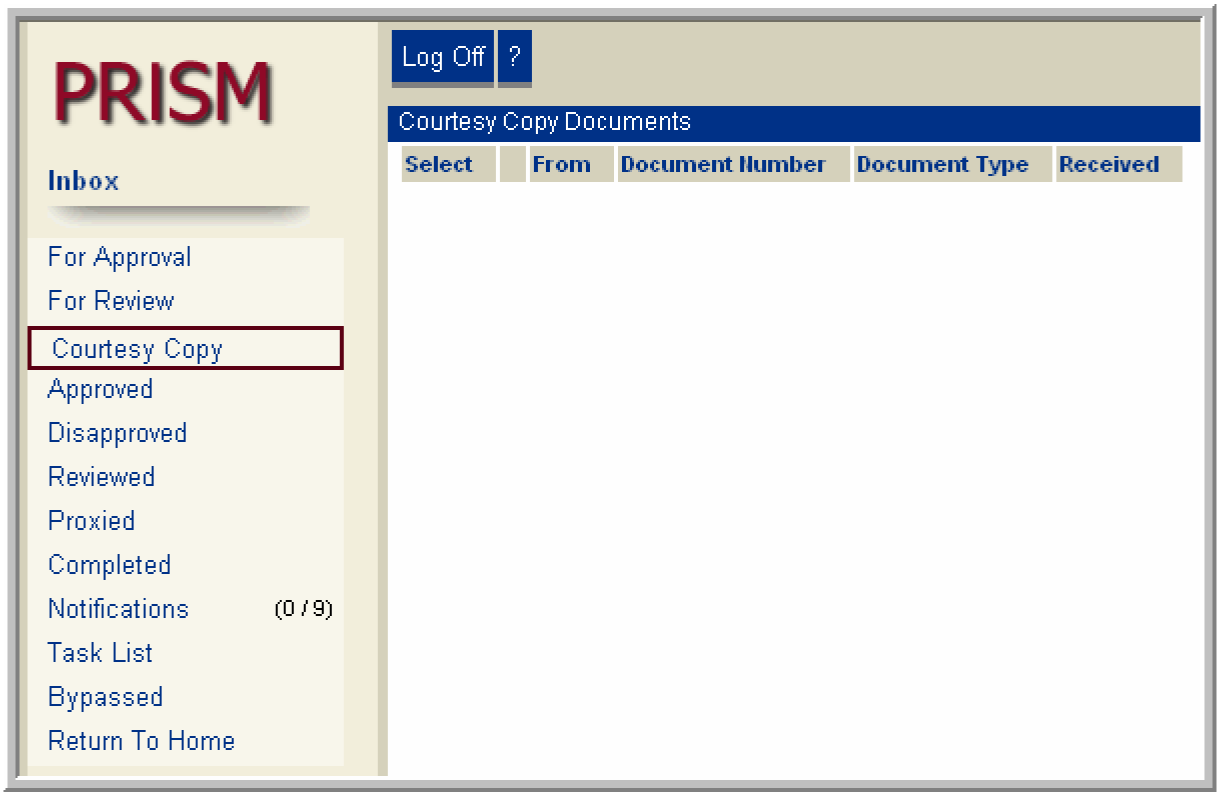
This section describes the enhancements made to the PRISM Inbox to support this new functionality.

Courtesy Copy Documents Page

The Courtesy Copy Documents page was added to PRISM to support the enhancements to the PRISM routing process. Use it to see a list of the documents routed to you as a courtesy, but no action is required.

To access this page, follow these steps.

1. From the PRISM Welcome page, click **Inbox** on the left menu, or click the hyperlink next to the message, "`You have [#] unread messages in your Inbox.`" The Documents for Approval page displays.
2. Click **Courtesy Copy** on the left menu. The Courtesy Copy Documents page displays. (See screen shot, next page.)



Column Definitions

This table lists the columns on this page, and descriptions of each.

Column Name	Description
Select	Click to select a document in the list.
From	Displays the name of the document's originator.
Document Number	Displays the document's number.
Document Type	Displays the type of document. For example, displays `Requisition` if you were routed a courtesy copy of a requisition, or `Solicitation` if you were routed a courtesy copy of a solicitation, etc.
Received	Displays the date on which PRISM routed the courtesy copy to your Inbox.

Button Definitions

This table lists the button on this page, and its description.

Button Name	Description
Log Off	Click to log off PRISM.

Route Page

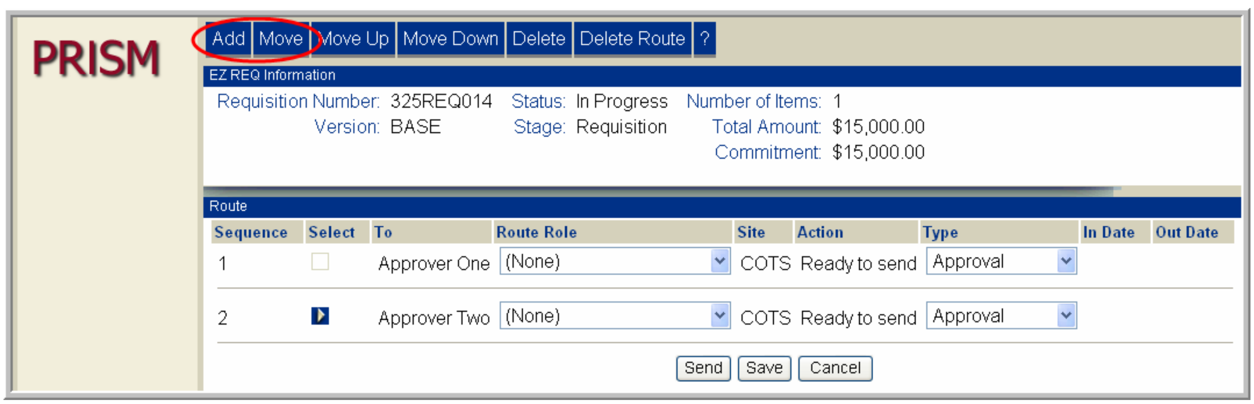
The following changes have been made to this page to support the enhancements to the PRISM routing process:

- The **Add Approver** and **Add Reviewer** buttons were removed. They were replaced by the **Add** button, in which their functionality was combined.
- The *Type* column was changed to read-write so you can specify the route type for the route nodes you set up. Also, it includes a dropdown list from which you can select **Approval**, **Review**, or **Courtesy Copy**.
- The **Move Up** and **Move Down** buttons do not display if there are less than two users on the route.
- The **Move** button was added to this page so you can move a reviewer or approver to a specific location on the route.

To access this page, follow these steps.

1. Access the document you want to route.
2. On the General Information page, click **Route** on the blue toolbar. The Review Route Selection page displays.
3. Select **Template**, **Private Template**, or **New Route**, according to your agency's business practices or your routing needs.
4. Click **Submit**. The Route page displays.

This is how this page might look at your agency.



Button Definitions

This table lists the new buttons on this page, and their descriptions.

Button Name	Description
Add	Click to access the Add User to Route List page, on which you can select from a list of PRISM users. These are the people on the route to whom the document is routed for review and/or approval during the procurement process.

Button Name	Description
Move	Displays when there are at least two users on the routing list. To move a user to a location higher or lower than another sequence number in the list, select their name, and click **Move** on the blue toolbar. The Move Sequence page displays.

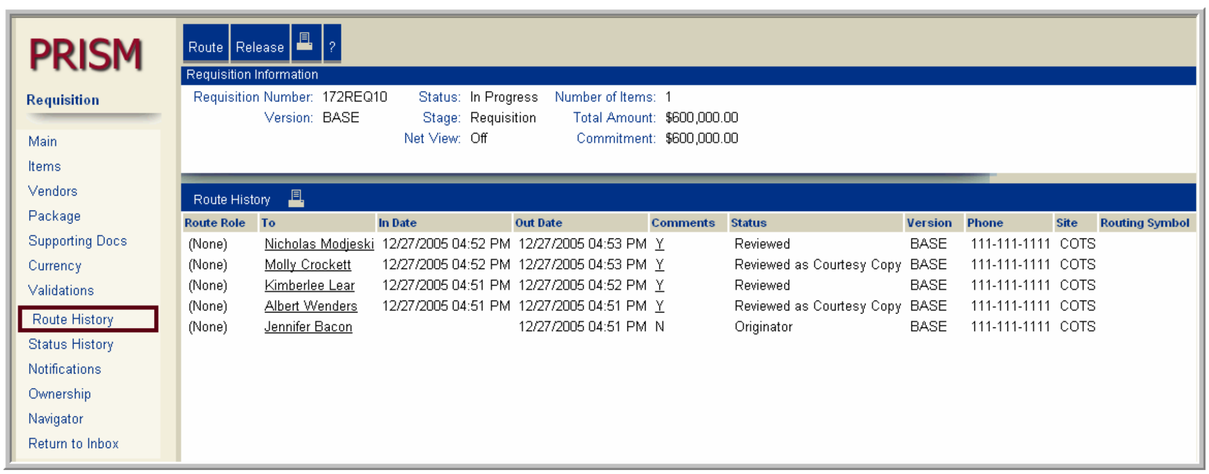
Route History

The following changes have been made to this page to support the enhancements to the PRISM routing process:

- PRISM logs the courtesy copy records as well as the review and approval records and displays that information on this page.
- The *Status* column displays `Reviewed as Courtesy Copy` for users in the list who were sent courtesy copies, after they review their courtesy copy of the document.
- The *Status* column displays `Reviewed` for users in the list who are reviewers, after they review the document.

To access this page, follow these steps.

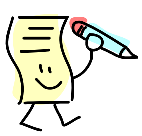
1. From the PRISM Welcome page, access a routed document.
2. Click **Route History** on the left menu. The Route History page displays.



User-Defined Time Limits

PRISM has been enhanced to include time-limits for documents awaiting approval and/or review in your Inbox. Your agency can set up notification rules for the following document types in PRISM:

- Requisitions
- Solicitations
- BPA Setups
- BPA Calls
- Contracts
- Delivery Order/Task Orders
- IAA’s
- MIPR’s
- Purchase Orders
- APP’s
- Invoices
- Acceptance Reports (if the acceptance type is DD 250 at the agency level)
- Grants
- Purchase Card Orders
- Section 845 OT’s
- Section 845 OT Delivery Order/Task Orders



Note

The MAS document type shares the route notification rules with the contract document type.

About Notifications

With this new functionality, you can now set up what are called “first notifications” and “recurring notifications” at the site level for each document type. When you set up your notifications, you can define the same set of user roles for first notifications as recurring notifications, based on the document type.

You can also set PRISM up to bypass a route role (whether they are an approver or a reviewer) after a certain number of days have passed. Lastly, PRISM notifies you if a document you were supposed to review or approve is bypassed.

About First Notifications

First notifications are one-time notifications sent to a user when a document is awaiting action for their particular route role. PRISM can be set up to send first notifications when the number of days a document has awaited action for a particular route role exceeds the number of days you specify.

About Recurring Notifications

Recurring notifications are multiple notifications sent to a user when a document has been awaiting action for their particular route role. PRISM can be set up to send recurring notifications after the first notifications have been sent, when the number of days a document is awaiting action since the last notification for a particular route role exceeds the number of days you specify.

Recurring notifications can be triggered upon approval and/or disapproval and/or review. They are sent repeatedly until the document leaves the current route role.

System Setup for User-Defined Time Limits

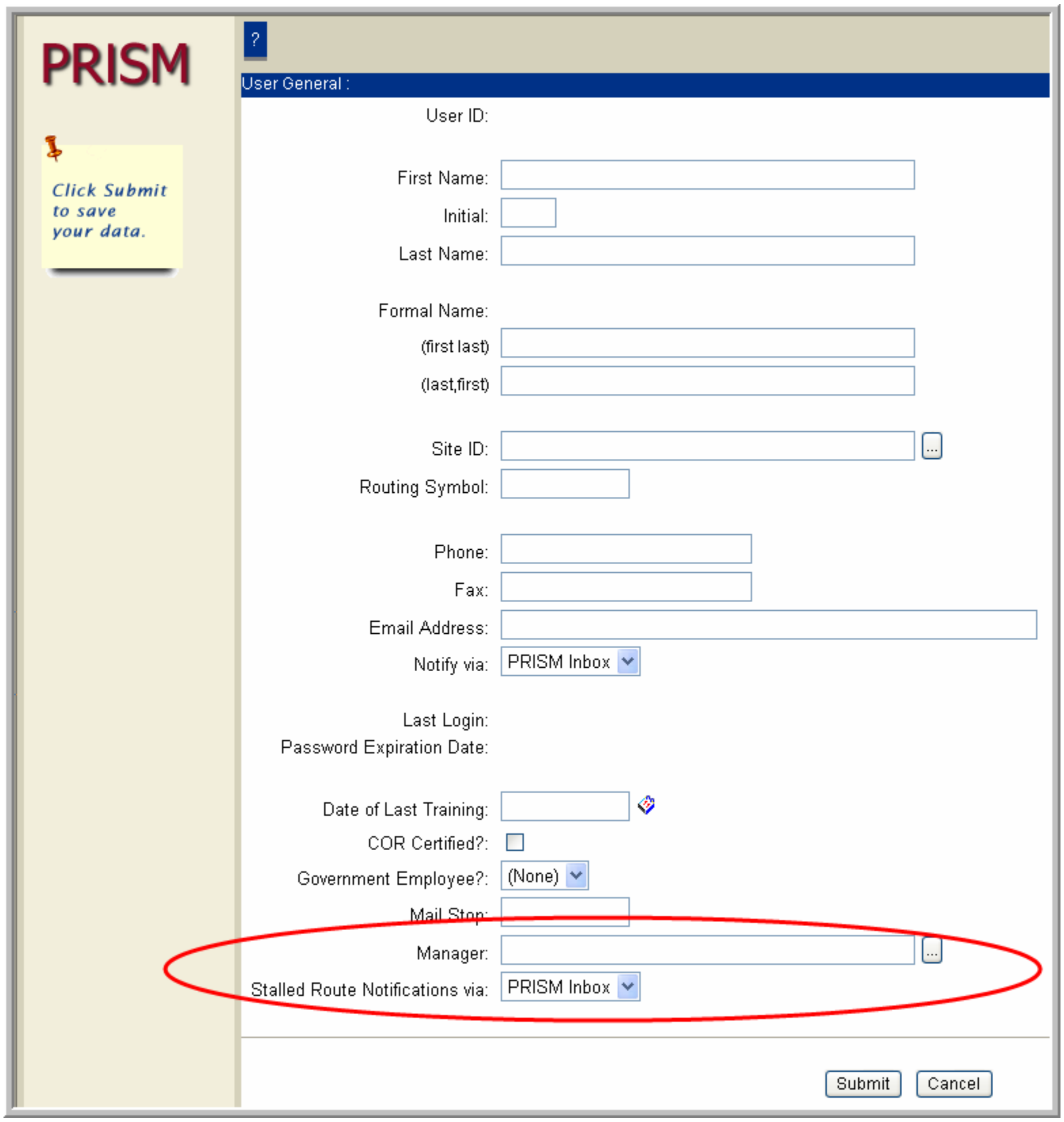
This section includes the setup necessary to use this new functionality.

User General Page

The *Manager* and *Stalled Route Notifications via* fields were added to this page to support the enhancements to the PRISM routing process:

To access this page, follow these steps.

1. From the PRISM Welcome page, click **System Setup** on the left menu.
2. Click **User** on the left menu. The User Selection page displays.
3. Select a user from the list and click **Open** on the blue toolbar. The General Summary page displays.
4. Click **Edit**. The User General page displays.



Field Definitions

This table lists the new fields on this page, and definitions of each.

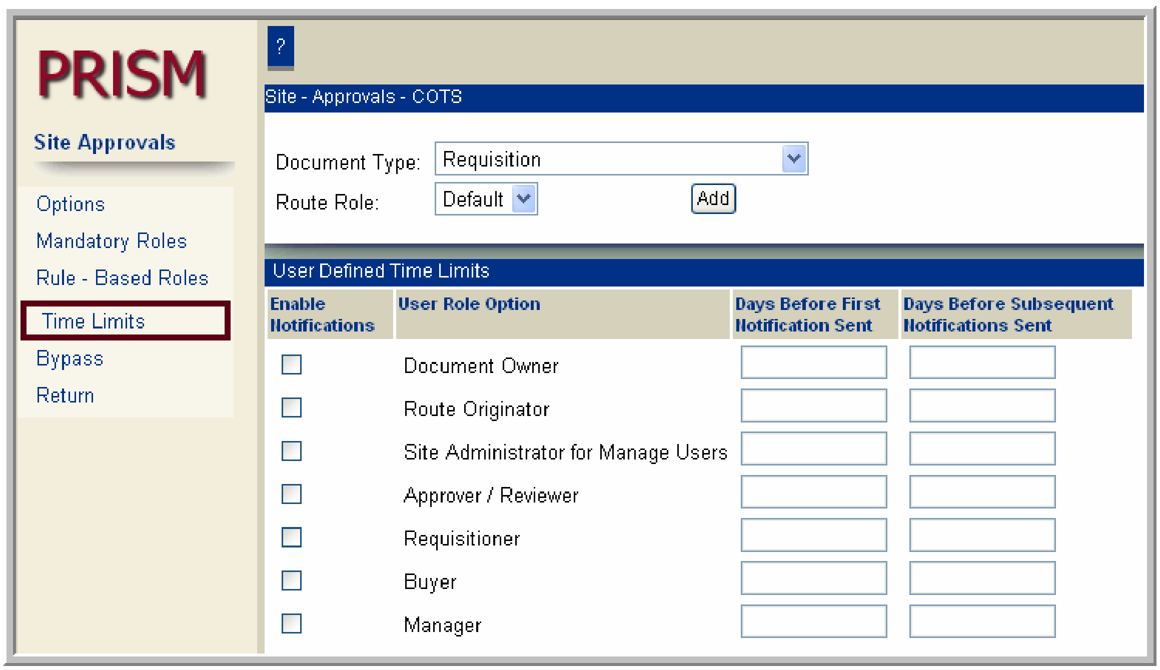
Field Name	Description
Manager	If you want to set up the manager for this user, type or select their name in this field.
Stalled Route Notifications via	Select **Email**, **PRISM Inbox**, or **Both**, according to how you want PRISM to send the stalled route notifications to the user's manager.

Site – User Defined Time Limits Page

The User Defined Time Limits page is new in PRISM to support the user-defined time limits new functionality. Use this page to activate the notifications feature, and to set up the number of days before PRISM sends first and/or subsequent notifications for document owners, route originators, site administrators for manage users, approvers/reviewers, buyers, and managers.

To access this page, follow these steps.

1. From the PRISM Welcome page, click **System Setup** on the left menu.
2. Click **Sys Configuration** on the left menu. The Site Selection page displays.
3. Select a site from the list and click **Open**. The General Summary page displays.
4. Click **Approvals** on the left menu. The Approvals Summary page displays.
5. Click **Edit** on the blue toolbar. The Options page displays.
6. Click **Time Limits** on the left menu. The User Defined Time Limits page displays.



Note

If you select the *Site Administrator for Manage Users* field on the User Defined Time Limits page, you must have given your site administrator the ability to manage sites so they can configure route notifications at the site level. To do so, check the box in the *Manage Sites* field on the Edit Site Admin for [site code] page. (System Setup | Sys Configuration | Open | Admins | select an administrator and Edit.)

Field Definitions

This table lists the fields on this page, and definitions of each.

Field Name	Description
Document Type	Select the document type for which you want to set up notifications.
Route Role	Select the route role for which you want to set up notifications.

Column Definitions

This table lists the columns on this page, and definitions of each.

Column Name	Description
Enable Notifications	Check the box to enable the notifications feature.
User Role Option	Displays a list of user roles for which you can enable the notifications features.
Days Before First Notification Sent	Type the number of days before the first notification message is to be sent to each user role in the list.
Days Before Subsequent Notifications Sent	Type the number of days before the subsequent notification message is to be sent to each user role in the list.

Button Definitions

This table lists the buttons on this page, and definitions of each.

Button Name	Description
Add	Click to access the Route Role Selection page, on which you can add a new route role to the drop-down list in the Route Role field.

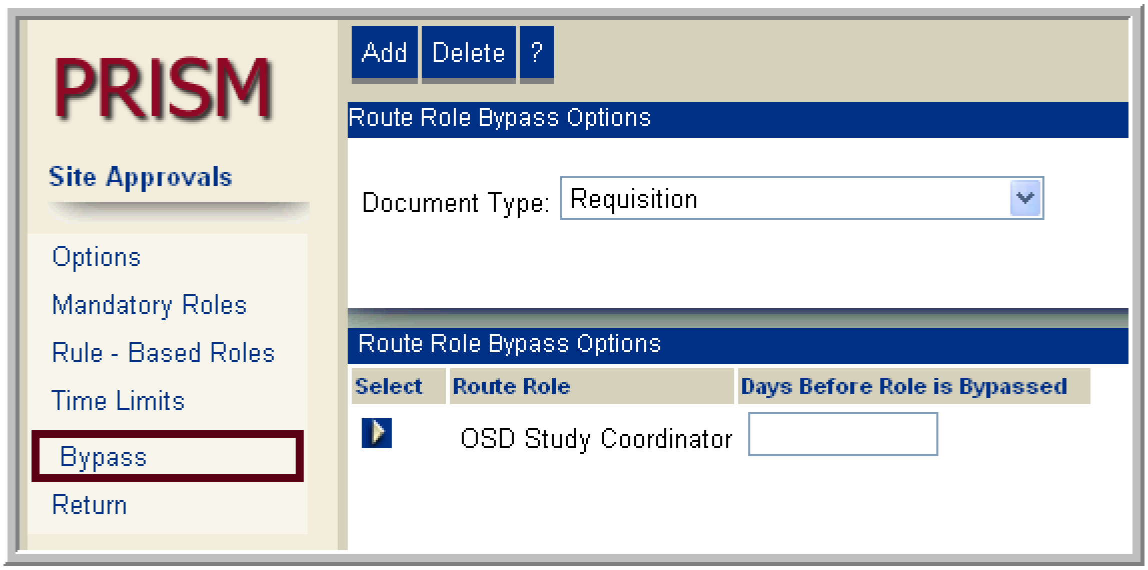
Site – Route Role Bypass Options Page

The Route Role Bypass Options page is new in PRISM to support the user-defined time limits new functionality. Use this page to set up the number of days that elapse before a route role is bypassed for different document types.

To access this page, follow these steps.

1. From the PRISM Welcome page, click **System Setup** on the left menu.
2. Click **Sys Configuration** on the left menu. The Site Selection page displays.
3. Select a site from the list and click **Open**. The General Summary page displays.
4. Click **Approvals** on the left menu. The Approvals Summary page displays.

5. Click **Edit** on the blue toolbar. The Options page displays.
6. Click **Bypass** on the left menu. The Route Role Bypass Options page displays.



Field Definitions

This table lists the fields on this page, and definitions of each.

Field Name	Description
Document Type	Select the document type for which you want to set up a route role bypass.

Column Definitions

This table lists the columns on this page, and definitions of each.

Column Name	Description
Select	Check the box to select a route role in the list.
Route Role	Displays the name of the route role.
Days Before Role is Bypassed	Type the number of days you want to elapse before PRISM skips this route role in the routing process.

Button Definitions

This table lists the buttons on this page, and definitions of each.

Button Name	Description
Add	Click to access the Route Role Selection page on which you can select a route role from the list.

Button Name	Description
Delete	Select a route role from the list and click to delete the role from the list.

Inbox

This section describes the enhancements to the PRISM Inbox.

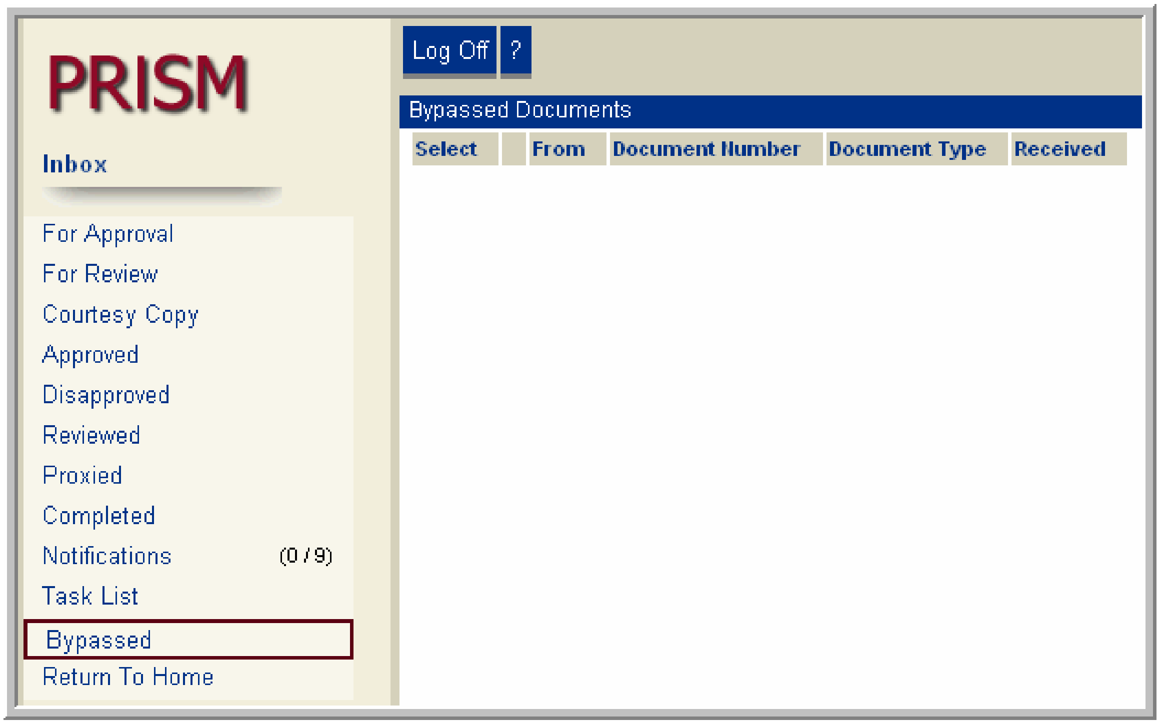
Bypassed Document Page

The Bypassed Document page is new in PRISM. It contains bypass notices for the documents that you were supposed to approve or review. If PRISM bypasses you, the bypassed document is removed from your For Approval folder, or For Review folder, and a bypass notice is sent to your Bypassed folder. Bypassed documents are then sent to the next PRISM approver or reviewer on the route list.

If you are set up to receive recurring notifications, when a notifications are triggered, a new record is sent to your Inbox (or email, according to your user profile setup).

To access this page, follow these steps.

1. From the PRISM Welcome page, click Inbox on the left menu or click **Inbox** on the left menu or click **Inbox** on the left menu, or you can click the hyperlink next to the message, `“You have [#] unread messages in your Inbox.”` The Documents for Approval page displays.
2. Click **Bypassed** on the left menu. The Bypassed Document page displays.



Column Definitions

This table lists the columns on this page, and descriptions of each.

Column Name	Description
Select	Click to select a document in the list.
From	Displays the name of the document's originator.
Document Number	Displays the document's number.
Document Type	Displays the type of document. For example, displays `Requisition` if the bypass notification was for a requisition, or `Solicitation` if the bypass notification was for a solicitation, etc.
Received	Displays the date on which PRISM routed the courtesy copy to your Inbox.

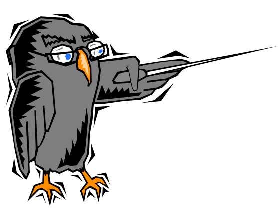
Button Definitions

This table lists the button on this page, and its description.

Button Name	Description
Log Off	Click to log off of PRISM.

Bypass Example

The following is an example scenario to illustrate how the bypass feature might work at your agency.



A routing list is set up with the following users, in this order:

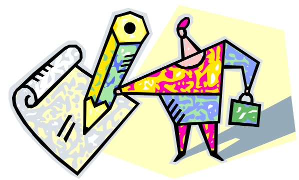
1. Julien (Approver)
2. Lydia (Approver)
3. Ciara (Reviewer)
4. Daphne (Approver)

The requisitioner in this scenario is named Olivier.

The routing list is set up with a five day time limits on reviewers. If a document sits in a reviewer's queue more than five days, PRISM will route it to the next person in the list and send a bypass notification to the owner of the route role that was bypassed.

So let's say it's summer vacation time and Ciara decides to take a three week trip to Montréal (lucky Ciara!). On the third day of her absence from work, Olivier decides he needs to buy some IT equipment so he creates a requisition and routes it for approval to the routing list above.

PRISM routes the document to Julien who immediately approves it. PRISM then routes it to Lydia, who also immediately approves it. Ciara is absent, so the requisition sits in her queue for five days. At the end of the fifth day, PRISM automatically routes the requisition to Daphne, and sends a bypass notification to Ciara, who will read the notification when she gets back from Montréal.



Your Notes

Security Groups

Compusearch is proud to announce enhancements to PRISM Security Groups! This section describes changes made to PRISM to support the enhancements to the Security Groups module in System Setup.

Important!

Do not worry! This enhancement does not change your current settings. Your agency's setup in the Security Groups module that was in place before this enhancement was introduced will be in place after it is introduced.

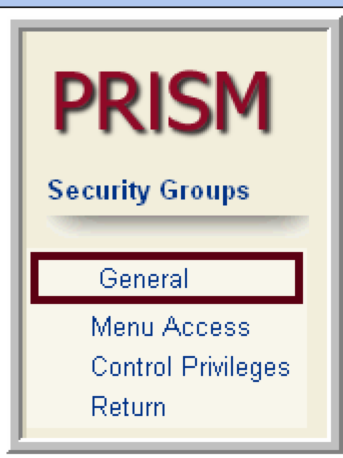
Security Groups Menu Changes

The Menu Access and Control Privileges menu items have been removed from the Security Groups menu, and their functionality combined and updated in the new Privileges page.

To access this menu, follow these steps.

1. From the PRISM Welcome page, click **System Setup** on the left menu. The System Setup menu displays.
2. Click **Security** on the left menu. The Security Groups page displays.
3. Click **Add**, or select a security group from the list and click **Edit**. The Edit Security Groups page displays, and the Security Groups menu displays on the left menu.

This table illustrates how the Security Groups menu looked before and after this enhancement.

Before This Enhancement	After This Enhancement
	

Edit Security Group Page

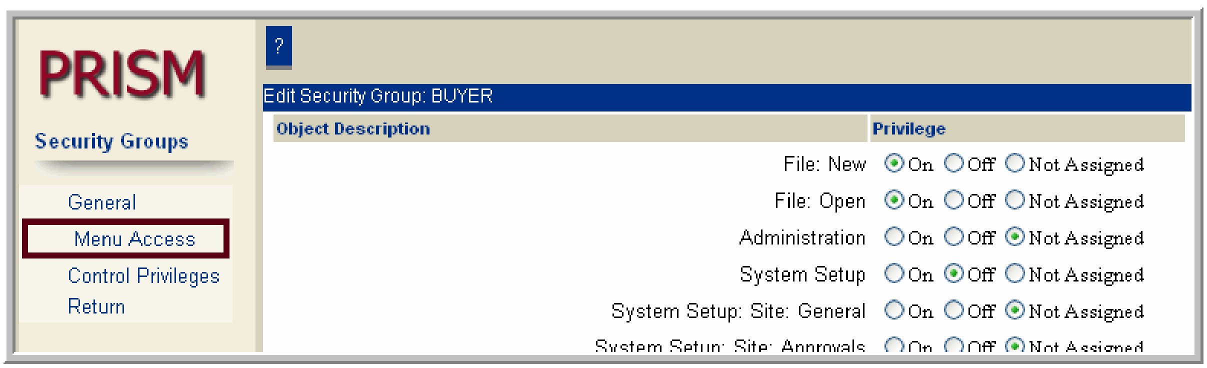
This page was modified to support the enhancements to the Security Groups module in System Setup. Before the change, you had use the **On**, **Off**, and **Not Assigned** radio buttons to activate or deactivate privileges for a security group. After the change, you click **Privileges** on the blue toolbar, and use the Privileges page to search for and set up each security group's privileges.

To access this page, follow these steps.

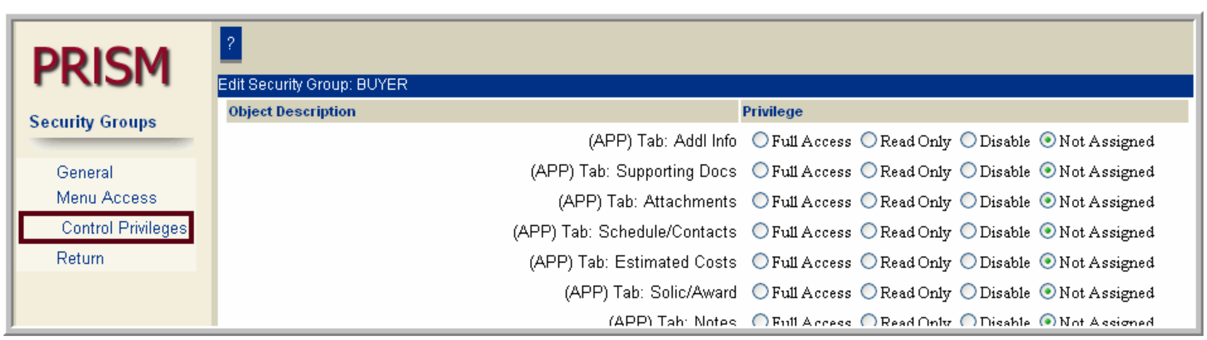
1. From the PRISM Welcome page, click **System Setup** on the left menu. The System Setup menu displays.
2. Click **Security** on the left menu. The Security Groups page displays.
3. Select a security group from the list and click **Edit**. The Edit Security Groups page displays.

Before

This is how this page might have looked at your agency for the Menu Access menu, <u>before</u> this enhancement to the Security Groups module.

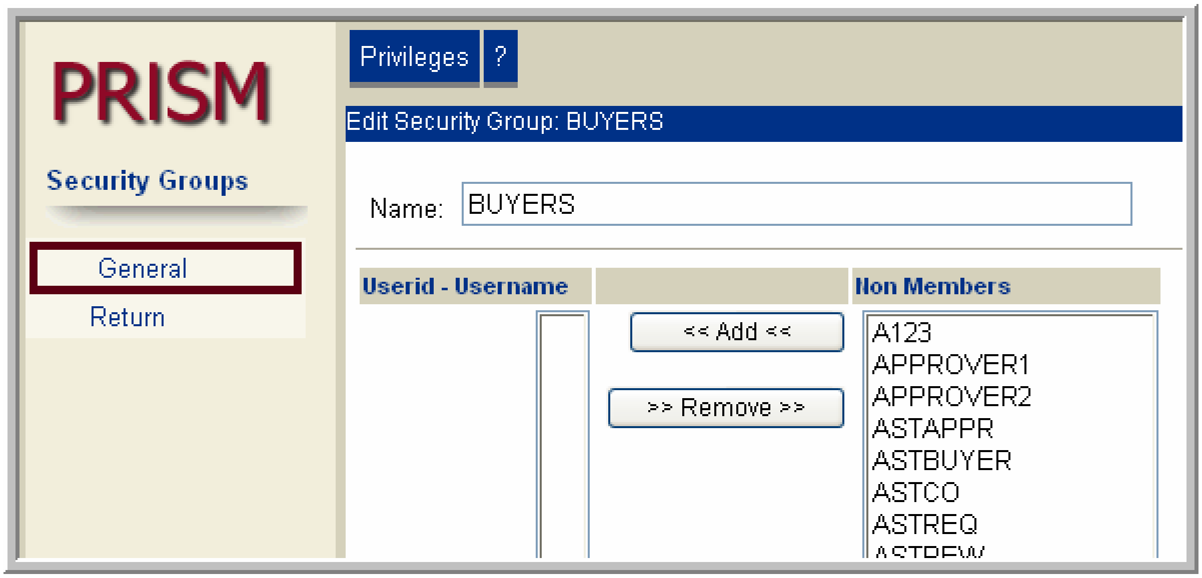


This is how this page might have looked at your agency for the Control Privileges menu, <u>before</u> this enhancement to the Security Groups module.



After

This is how this page might have looked at your agency <u>after</u> this enhancement to the Security Groups module.



Privileges Page

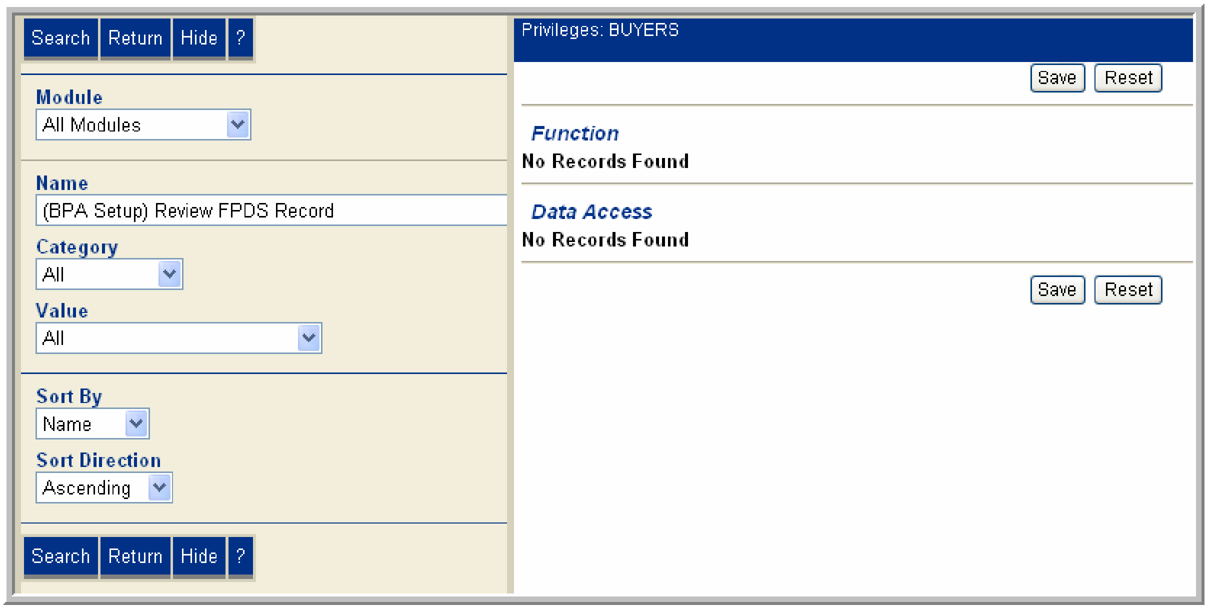
The Privileges page was added to PRISM to support the enhancements to the Security Groups module. Use it to search for and view the privileges set up for your agency's Public and non-public security groups.

Wait a Minute!

Before you read any further, it's important that you understand that there is no concept of cancel in this enhanced version of Security Groups. Normally if you click **Cancel** in PRISM, the changes you make are not saved. If you click **Return** on the Privileges page, changes you made <u>are</u> saved. You must click **Reset** if you want to revert back to the settings that were in place before you made changes.

To access this page, follow these steps.

1. From the PRISM Welcome page, click **System Setup** on the left menu. The System Setup menu displays.
2. Click **Security** on the left menu. The Security Groups page displays.
3. Select a security group from the list and click **Edit**. The Edit Security Groups page displays.
4. Click **Privileges** on the blue toolbar. The Privileges page displays. (See screen shot, next page.)



Field Definitions

This table lists the fields on this page, and descriptions of each.

Field Name	Description
Module	Select the module for which you want to view or set up group security, select the name of the function in the *Name* field, and click **Search** if you want to set up group security for a specific function in a specific module. Or, you can select **All Modules** from the list and select the name of the function in the *Name* field, and click **Search** if you want to view or set up group security for a specific function across all modules.
Name	Select the name of the function for which you want to view or set up group security.
Category	Select **All** if you want to search by both action (Function), and by the type of data to which the user has access (Data Access). Select **Function** if you want to search by actions (things from the blue toolbar, such as FPDS, Cancel, Suspend, etc.). Select **Data Access** if you want to search by the type of data to which the user has access (things from the left menu such as Attachments, or Limits, etc.).

<table>
<tr><th>Field Name</th><th>Description</th></tr>
<tr><td>Value</td><td>You can search by value for both the Public security group, and non-public security groups. The selections that display in the drop-down list differ depending on whether you are searching the Public security group or non-public security groups. For example, the Public security group uses <code>Hidden</code> as a value, and non-public security groups use <code>Not Assigned</code> as a value.

If you are updating or setting up security for non-public security groups:
Select All if you want to view all the values set up for a security group, whether they are on, or not assigned.
Select On if you want to view only those items which are activated for a security group.
Select Not Assigned if you want to view only those items which are not assigned for a security group.
If you are updating or setting up security for the Public security group:
Select All if you want to view all the items set up for the Public security group, whether it is activated, editable, read-only, deactivated, or hidden.
Select On / Full Access / Read Only if you want to view only those items set up for the Public security group which are activated, editable, or read-only.
Select Off / Hidden if you want to view only those items set up for the Public security group which are deactivated, or hidden from the user's view.</td></tr>
<tr><td>Sort By</td><td>Select Module if you want to view the list in alphabetical order by the items in the Module column.

Select Name if you want to view the list in alphabetical order by the items in the Name column.

Select Category if you want to view the list in alphabetical order by the items the Category column.

Select Value if you want to view the list in alphabetical order by the items in the Value column.</td></tr>
<tr><td>Sort Direction</td><td>Select Ascending if you want to view the list in alphabetical order starting with the letter A and ending with the letter Z.

Select Descending if you want to view the list in reverse alphabetical order, starting with the letter Z and ending with the letter A.</td></tr>
</table>

Column Definitions

This table lists the columns on this page, and descriptions of each.

Column Name	Description
Module	Displays the PRISM module for each function or data access feature in the list.
Name	Displays the name of each function or data access feature in the list.
Value	Displays a checkbox functions and drop-down list for data access. If you are setting up security for a function, check the box to activate it. If you are setting up security for a data access feature: • Select **Full Access** if you want all users in the security group to have full access to that feature. • Select **Read Only** if you want all users in that security group to be able to view that feature but you do not want them to be able to make changes. • Select **Hidden** if you do not want that feature to display in PRISM for any of the users in the security group.
Public	Displays `On`, or `Off`, depending on the item's status in the Public security group. Settings in the Public security group supersede any settings in subsequent security groups.

Button Definitions

This table lists the buttons on this page, and descriptions of each.

Button Name	Description
Search	Select the criteria for your query and click **Search**. PRISM returns a list of the items that meet your criteria.
Return	Click to go back to the Edit Security Group page. PRISM automatically saves your security group settings, so nothing is lost when you click **Return**.
Hide	Click if you do not want to view the left panel on the page. When you click **Hide**, the **Show Search Criteria** button displays.
Show Search Criteria	Click if you want to view the left panel on the page. Displays only if you click **Hide**.
Save	Click to save your security group settings.

Button Name	Description
Reset	Click to revert back to the settings in place before you made changes.

Examples

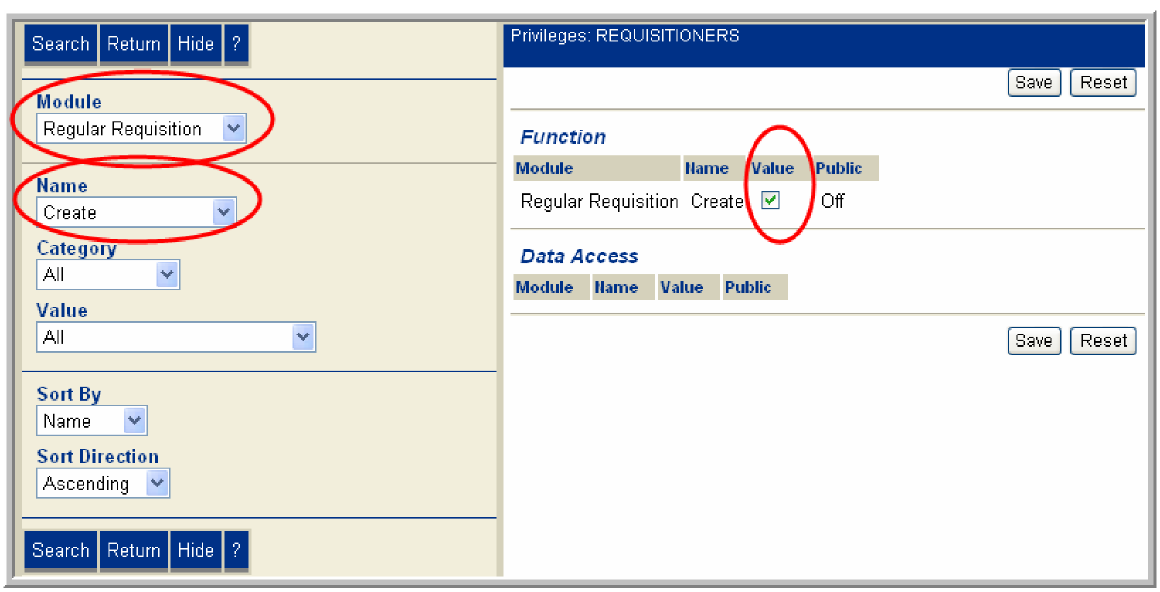
This section contains some examples of how you might use the new Privileges page to set up system access rights for a security group.

Setting Up Ability to Create Requisitions

Let's say you just created a security group called Requisitioners, and you want to set them up with access rights to create requisitions.

The steps to do so might look something like this:

1. From the PRISM Welcome page, click **System Setup** on the left menu. The System Setup menu displays.
2. Click **Security** on the left menu. The Security Groups page displays.
3. Select the **Requisitioners** security group from the list, and click **Edit**. The Edit Security Groups page displays.
4. Click **Privileges** on the blue toolbar. The Privileges page displays.
5. In the *Module* field, select **Regular Requisition**.
6. In the *Name* field, select **Create**.
7. Click **Search**. PRISM searches for your criteria and displays the information related to your search.
8. Check the box in the *Value* column to set up all users in the Requisitions security group with the ability to create regular requisitions.



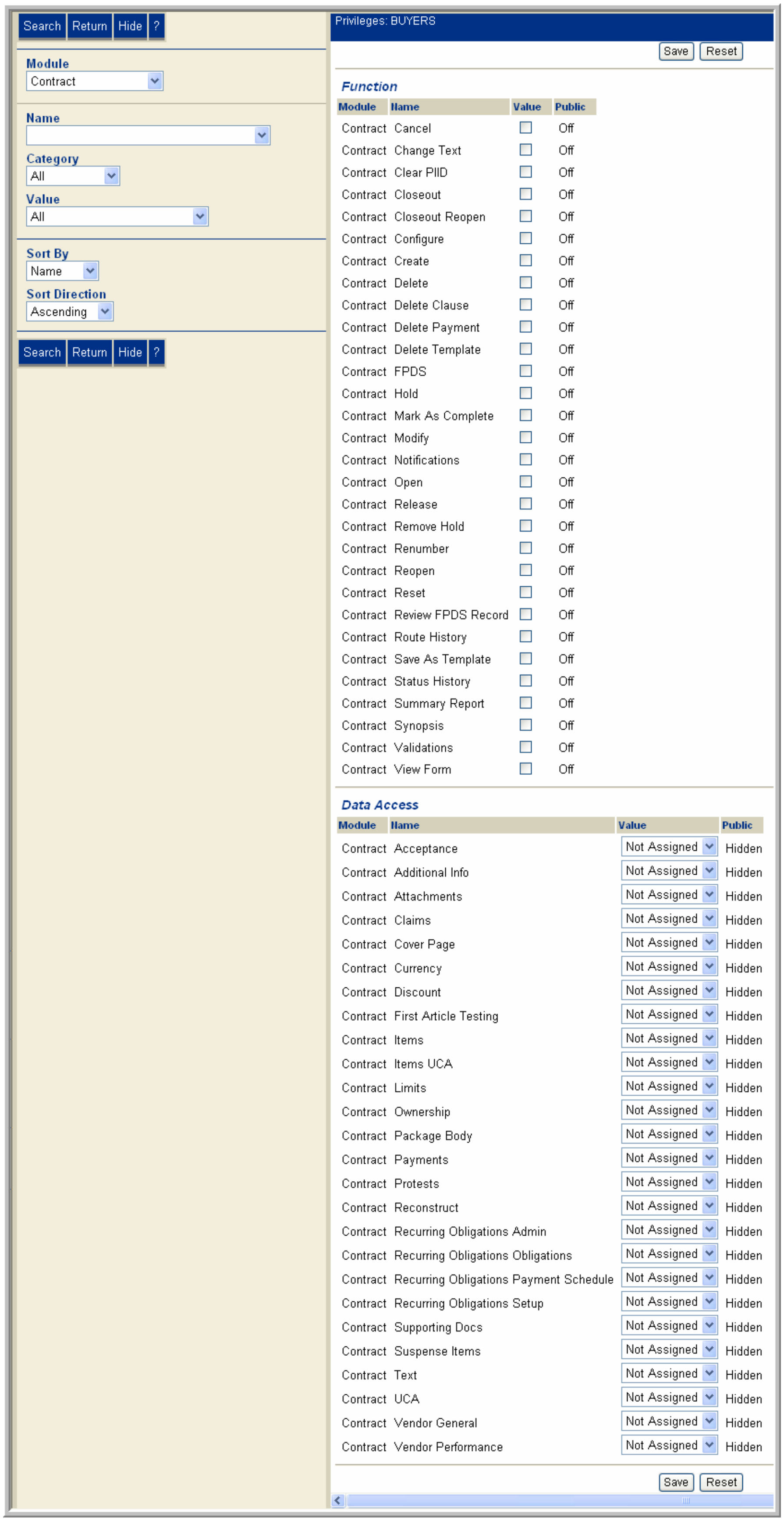
9. Click **Save**. PRISM saves the setting in the *Value* column.
10. Click **Return** to go back to the previous page.

Determining Security Set Up for Contracts

Let's say your agency has a security group called Buyers, and you want to find out what security has already been set up for contracts for that security group.

The steps to do so might look something like this:

1. From the PRISM Welcome page, click **System Setup** on the left menu. The System Setup menu displays.
2. Click **Security** on the left menu. The Security Groups page displays.
3. Select the **Buyers** security group from the list, and click **Edit**. The Edit Security Groups page displays.
4. Click **Privileges** on the blue toolbar. The Privileges page displays.
5. In the *Module* field, select **Contract**.
6. Leave the *Name* field blank.
7. Click **Search**. PRISM searches for your criteria and displays the information related to your search. (See screen shot, next page.)


Search Return Hide ?
Module
Contract
Name
Category
All
Value
All
Sort By
Name
Sort Direction
Ascending
Search Return Hide ?
Privileges: BUYERS
Save Reset
Function
Module Name Value Public
Contract Cancel Off
Contract Change Text Off
Contract Clear PIID Off
Contract Closeout Off
Contract Closeout Reopen Off
Contract Configure Off
Contract Create Off
Contract Delete Off
Contract Delete Clause Off
Contract Delete Payment Off
Contract Delete Template Off
Contract FPDS Off
Contract Hold Off
Contract Mark As Complete Off
Contract Modify Off
Contract Notifications Off
Contract Open Off
Contract Release Off
Contract Remove Hold Off
Contract Renumber Off
Contract Reopen Off
Contract Reset Off
Contract Review FPDS Record Off
Contract Route History Off
Contract Save As Template Off
Contract Status History Off
Contract Summary Report Off
Contract Synopsis Off
Contract Validations Off
Contract View Form Off
Data Access
Module Name Value Public
Contract Acceptance Not Assigned Hidden
Contract Additional Info Not Assigned Hidden
Contract Attachments Not Assigned Hidden
Contract Claims Not Assigned Hidden
Contract Cover Page Not Assigned Hidden
Contract Currency Not Assigned Hidden
Contract Discount Not Assigned Hidden
Contract First Article Testing Not Assigned Hidden
Contract Items Not Assigned Hidden
Contract Items UCA Not Assigned Hidden
Contract Limits Not Assigned Hidden
Contract Ownership Not Assigned Hidden
Contract Package Body Not Assigned Hidden
Contract Payments Not Assigned Hidden
Contract Protests Not Assigned Hidden
Contract Reconstruct Not Assigned Hidden
Contract Recurring Obligations Admin Not Assigned Hidden
Contract Recurring Obligations Obligations Not Assigned Hidden
Contract Recurring Obligations Payment Schedule Not Assigned Hidden
Contract Recurring Obligations Setup Not Assigned Hidden
Contract Supporting Docs Not Assigned Hidden
Contract Suspense Items Not Assigned Hidden
Contract Text Not Assigned Hidden
Contract UCA Not Assigned Hidden
Contract Vendor General Not Assigned Hidden
Contract Vendor Performance Not Assigned Hidden
Save Reset